KNOWLEDGE TRANSFER IS REALLY FORMALIZING THE PROCESS OF SHARING

KNOWLEDGE TRANSFER: CAN WE REALLY BE THAT BAD AT IT?

When looking at the fundamental underpinnings of two processes, onboarding and knowledge transfer, both basically involve some form of training or learning activities that pass on a select subset of the corporation's knowledge to an individual or group of employees. The difference is that knowledge transfer also considers the collection and origin of the content.
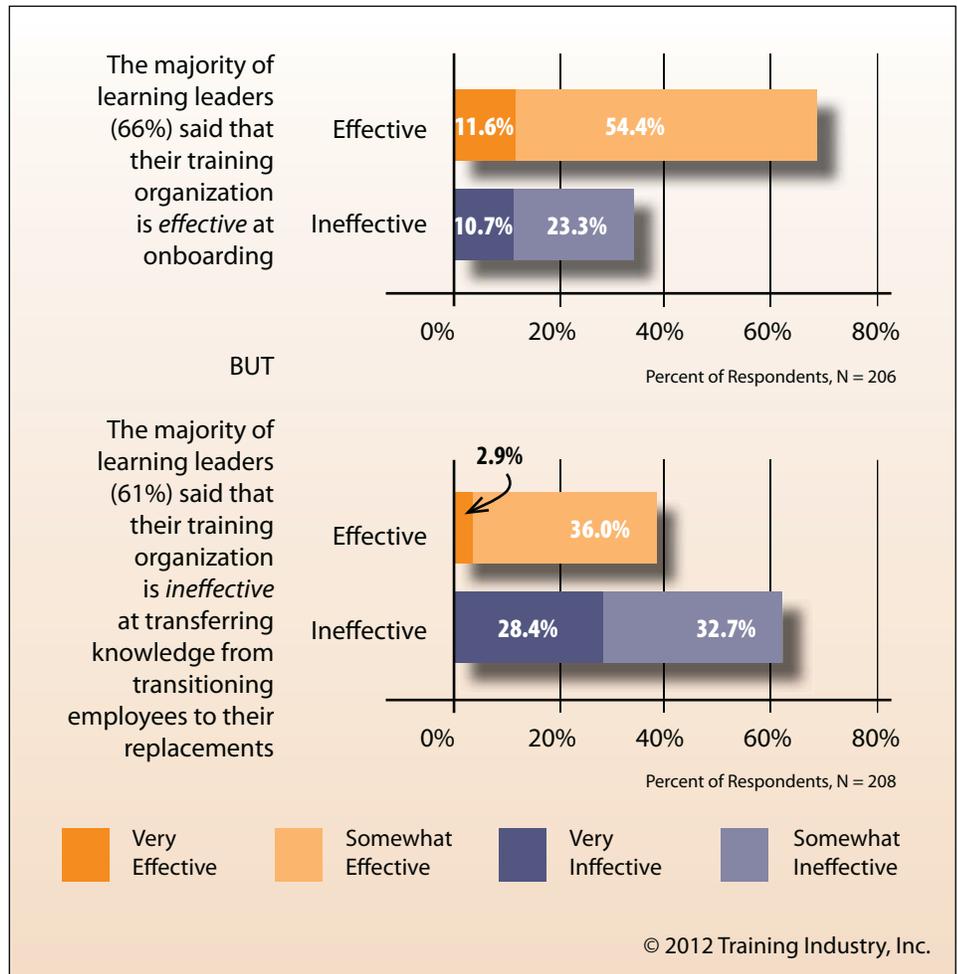
Training Industry, Inc. recently completed a study that focused on how effective learning leaders believed they were when it came to onboarding and knowledge transfer. Not surprisingly, 66 percent of learning leaders felt they were effective when it came to onboarding, but the interesting finding was how much that contrasted with their self-assessment when it came to knowledge transfer. Sixty-one percent of learning leaders felt their organizations were ineffective at knowledge transfer. (See *Figure 1*.)

Best Practices – What Do They Tell Us?

When we drilled down further to understand the difference, it became apparent that the underlying problem was really a lack of formal process around knowledge transfer, a stark contrast to the onboarding process in most companies. We asked more than 200 learning leaders to give us some of their best practices for both of these processes in an effort to share what learning leaders have discovered when challenging either of the two critical learning activities.

Learning leaders listed the following best practices to ensure onboarding programs are current and aligned with business goals

Figure 1

Figure 1 — Top chart: "The majority of learning leaders (66%) said that their training organization is *effective* at onboarding." Effective: 11.6% (Very Effective), 54.4% (Somewhat Effective). Ineffective: 10.7% (Very Ineffective), 23.3% (Somewhat Ineffective). Percent of Respondents, N = 206.

BUT

Bottom chart: "The majority of learning leaders (61%) said that their training organization is *ineffective* at transferring knowledge from transitioning employees to their replacements." Effective: 2.9% (Very Effective), 36.0% (Somewhat Effective). Ineffective: 28.4% (Very Ineffective), 32.7% (Somewhat Ineffective). Percent of Respondents, N = 208.

Legend: Very Effective, Somewhat Effective, Very Ineffective, Somewhat Ineffective.

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(in order of most to least often mentioned):

- **Ensure leadership involvement and support** before, during and after onboarding.
- **Continuously evaluate training** to make sure it is both current and effective, making changes accordingly.
- **Involve all departments/functional areas** in the design, development, delivery, and review of onboarding.
- **Agree on business goals** beforehand and develop an onboarding/training framework for those involved to follow.
- **Plan and implement coaching programs** or mentor networks for new or transitioning employees.

- **Ensure consistent and ongoing onboarding** and training programs.

Upon review of the best practices for onboarding, we saw a set of higher order practices focused on critical alignment, both for leadership and cross functional teams, and continuous evaluation. These practices were about ensuring that onboarding met the goals of the organization, stayed relevant and was consistent regardless of who it was delivered to, where it took place or when the course was provided.

When reviewing the best practices for knowledge transfer, we saw a set of basic how-to practices that really focused on developing a strategy and enabling the transfer to take place. The practices recommended looking at "allowing or enabling" knowledge transfer, setting up a strategy and incorporating various methods.

Learning leaders cited the following best practices for improving companies' knowledge transfer strategies (in order of most to least often mentioned):

- **Facilitate peer-to-peer and team training,** including mentor networks, coaching, shadowing, paired work, etc.
- **Develop a knowledge transfer strategy**, integrate into daily operations, and formalize it.
- **Deliver information and training in a variety of methods** that are engaging and easy to use and understand.
- **Have a single knowledge repository** that is relevant, organized, and constantly monitored and updated.
- **Continuously review and measure** the effectiveness of knowledge transfer practices and revise them as necessary.
- **Ensure leadership support** and involvement.

Use of Tools and Technology in Knowledge Transfer

When looking at the groups that rated themselves as effective in knowledge transfer, they tended to use all technologies and tools more often than those who viewed themselves as ineffective. Most interesting to note was the use of mentor networks and coaching, both of which were used significantly more often by effective organizations. (See *Figure 2.*)

It was also interesting to see how basic the toolsets being used were for knowledge transfer, such as coaching and work shadowing. More advanced toolsets like video capture and narrative transfer, where the organization can collect the knowledge from their subject matter experts (SMEs), were used in less than 25% of companies.

Summary

I believe the research shows us a glaring need to formalize the process of transferring knowledge or sharing, much like we have done for new hire, onboarding training over the past 20 years. If we can look at the processes we have in place to capture the content required to effectively onboard new employees, and employ that in the development of knowledge sharing programs, we should be able to quickly and effectively improve the quality of those programs.

We should also look to better employ next generation tools and technologies to help speed this transition. With a good process in place and the tools to quickly and efficiently capture a company's collective wisdom on a topic or approach, we can preserve that knowledge for the next generation of employees.

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Figure 2: Tools Used for Knowledge Transfer

Learning leaders from effective organizations reported using coaching and mentor networks almost twice as often as ineffective organizations.

Tool	Effective Group, N = 81	Ineffective Group, N = 127
Work shadowing	64.2%	48.8%
Coaching	72.8%	40.7%
Short-form content (e.g. job aids, quick reference guides)	56.8%	40.7%
Knowledge repository/e-library/wiki	46.9%	35.8%
Desktop process and procedure updates	45.7%	30.1%
Paired work	43.2%	31.7%
Short e-learning pieces	43.2%	30.9%
Mentor networks	49.4%	22.0%
Narrative transfer	27.2%	27.6%

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