Knowledge Transfer Guide

BRITISH COLUMBIA
BC Public Service

Where ideas work

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About This Guide

This guide will introduce employees to knowledge transfer and help you and your team understand:

- What is knowledge
- What is knowledge transfer
- Why knowledge transfer is important
- When knowledge transfer occurs
- The knowledge transfer process

This guide is supported by templates and worksheets that will assist you and your team in prioritizing knowledge transfer activities and capturing and transferring knowledge. While this guide is comprehensive, it's not exhaustive. Some ministries are preparing or already using knowledge transfer tools to address knowledge transfer needs and reduce the risk of knowledge loss. The knowledge transfer resources on MyHR provide links to ministry knowledge transfer resources.

What is Knowledge?

Different types of knowledge require different approaches to learning and development. Knowledge can be broken down into two primary types:
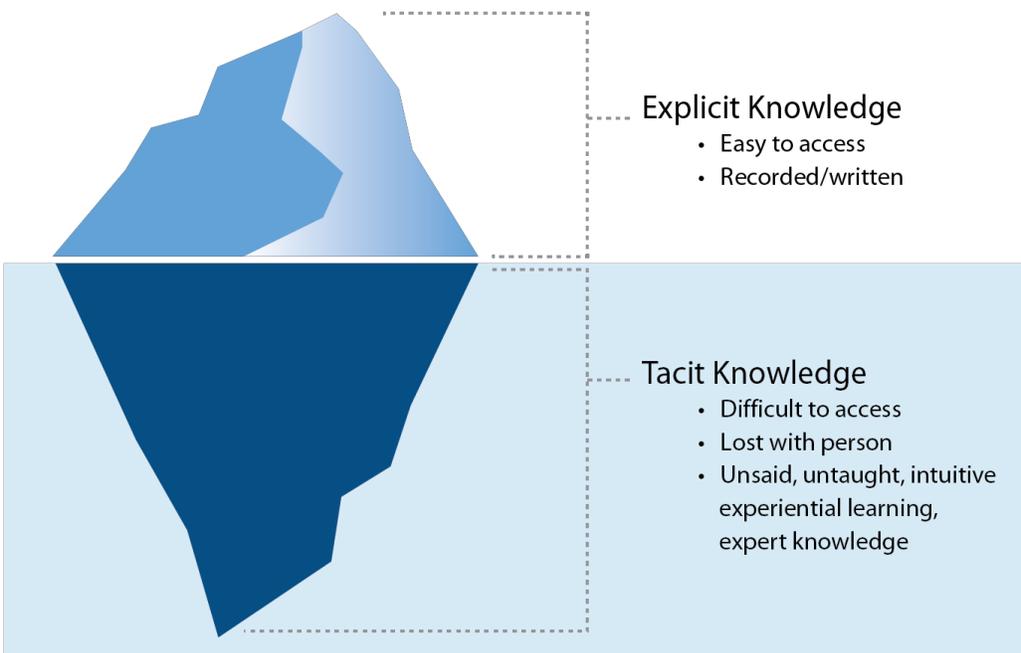
- Explicit knowledge
- Tacit knowledge

Explicit knowledge: is formalized knowledge that can be clearly recorded and documented in multiple forms such as a manual, handout, textbook, or audio-visual resource. It's described as "know-what" knowledge and is easily accessed and shared with individuals. Explicit knowledge is easy to articulate, communicate, and store.

Tacit knowledge: is personal knowledge embedded in individuals from their experiences and involves intangible elements, such as personal beliefs, perspectives, and values. It's described as "know-how" and is hard to articulate, communicate, and store because it's usually not written down or captured. Tacit knowledge can be the most precious source of knowledge.

Iceberg of Knowledge
Knowledge could be described as a floating iceberg. Explicit knowledge is the tip of the iceberg seen on top of the water while tacit knowledge is the bottom of the iceberg that's deeper and larger than the tip, yet not visible on the surface. Explicit knowledge is visible because it's easy to access and clearly recorded. Tacit knowledge is hidden below the surface because it's often developed through individual experience. Tacit knowledge is lost when the knowledge holder leaves the organization unless an effort is made to capture and transfer this knowledge.

Explicit Knowledge
- Easy to access
- Recorded/written

Tacit Knowledge
- Difficult to access
- Lost with person
- Unsaid, untaught, intuitive experiential learning, expert knowledge

What is Knowledge Transfer?

Knowledge transfer in the workplace is the process of distributing knowledge that's been developed in an organization with one or more specific individuals to other parts of the organization or individuals.

Knowledge transfer happens all the time from informal water cooler conversations to formal knowledge transfer programs such as:

- Mentoring
- Job/task/project shadowing
- Temporary assignments
- Workshops, courses, etc.
- Overlap or partnered work
- Creation of job aids

Formal approaches are often what come to mind when people think about knowledge transfer and these approaches can be very effective. It's important to remember that informal approaches such as transition meetings and team scrums are also very effective and can be timely for knowledge transfer and continuous learning. There's no one size fits all knowledge transfer solution. The most effective approach is what works for you, your team, and your work. The Capture & Transfer Knowledge section explores more ideas.

Why Knowledge Transfer is Important

Knowledge transfer plays an important role in succession management, operational excellence, and the ongoing success of an organization. The benefits of knowledge transfer include:

- Timely identification of knowledge areas at risk
- Identification of knowledgeable experts
- Streamlined onboarding
- Reduced time from hire to productivity
- Consistent standards and approach to business delivery

The BC Public Service, like most employers, is facing a competitive labour market where prospective employees have more employment choices while many long tenure employees are retiring. Without effective knowledge transfer approaches, employees take vital knowledge and experience with them when they retire or change jobs.

When Knowledge Transfer Occurs

Knowledge transfer can happen across ministries, among teams within ministries, or among members within a team. When approaching knowledge transfer in any of these situations, it's helpful to consider the stage of an employee in their knowledge lifecycle, outlined in the diagram below. Knowing where you and your team members are in your individual knowledge lifecycles will help everyone get the right support for knowledge transfer.

Employee Knowledge Lifecycle
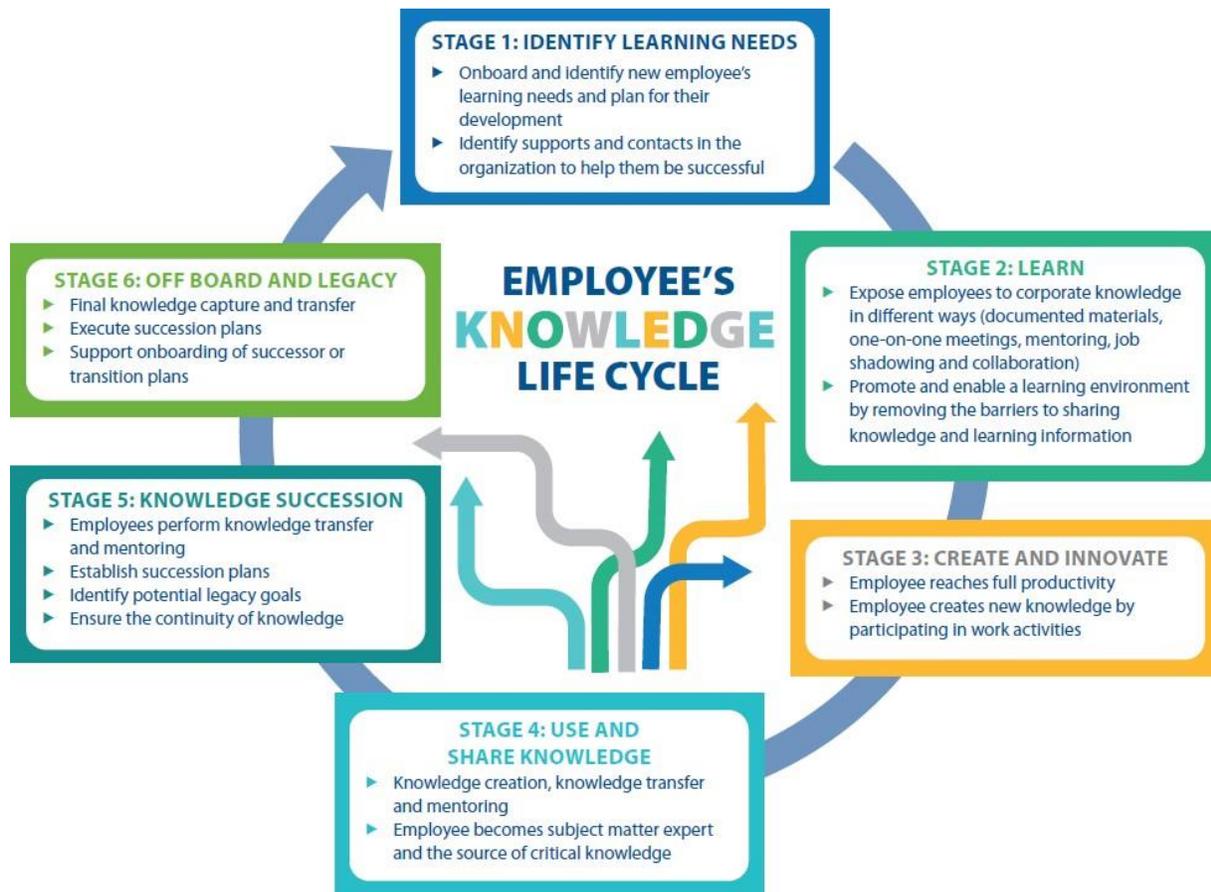
Stage 1: Identify Learning Needs
- Onboard and identify new employee's learning needs and plan for their development
- Identify supports and contacts in the organization to help them be successful

Stage 2: Learn
- Expose employees to corporate knowledge in different ways (documented materials, one-on-one meetings, mentoring, job shadowing, and collaboration)
- Promote and enable a learning environment by removing the barriers to sharing knowledge and learning information

Stage 3: Create & Innovate
- Employee reaches full productivity
- Employee creates new knowledge by participating in work activities

Stage 4: Use & Share Knowledge
- Knowledge creation, knowledge transfer, and mentoring
- Employee becomes subject matter expert and the source of critical knowledge

### Stage 5: Knowledge Succession
- Employees perform knowledge transfer and mentoring
- Establish succession plans
- Identify potential legacy goals
- Ensure the continuity of knowledge

Stage 6: Off Board & Legacy
- Final knowledge capture and transfer
- Execute succession plans
- Support onboarding of successor or transition plans

Knowledge Transfer Process

Knowledge transfer can be done in a variety of different ways. While the specifics may differ from situation to situation, the general knowledge transfer process has four phases: identify, prioritize, capture and transfer, and share and store.
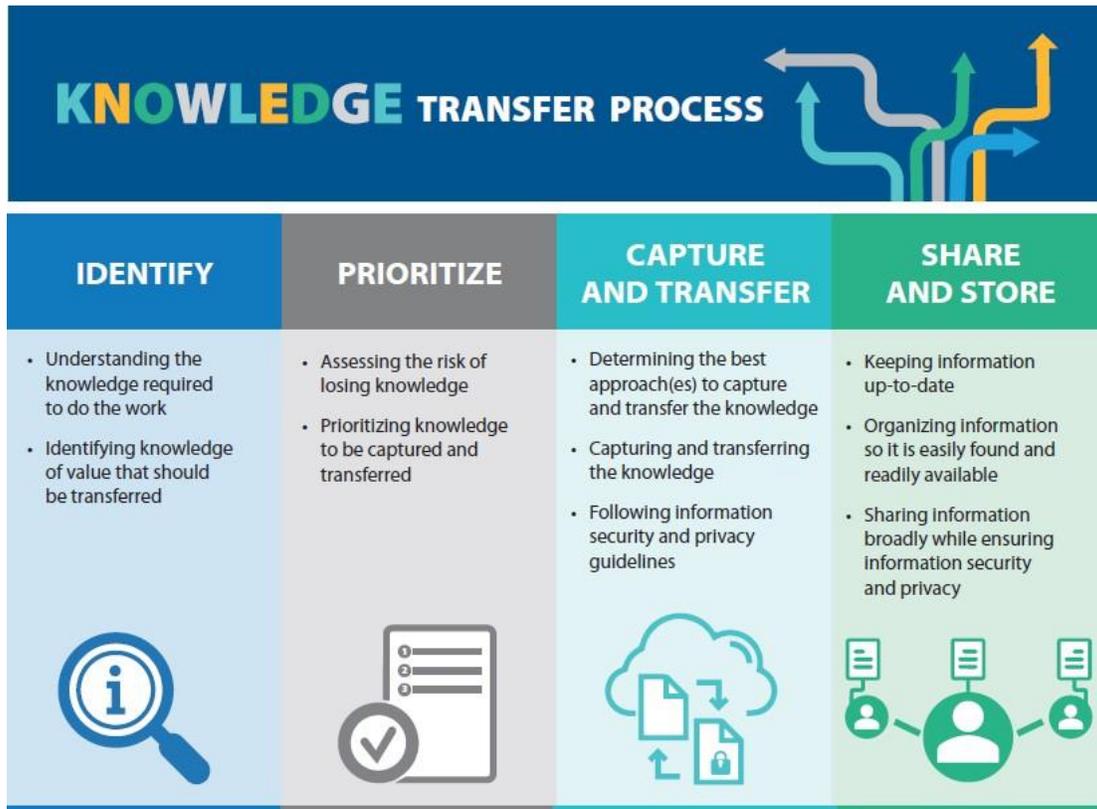
Identify
- Understanding the knowledge required to do the work
- Identifying knowledge of value that should be transferred

Prioritize
- Assessing the risk of losing knowledge
- Prioritizing knowledge to be captured and transferred

Capture & Transfer
- Determining the best approaches to capture and transfer the knowledge
- Capturing and transferring the knowledge
- Following information security and privacy guidelines

Share & Store
- Keeping information up-to-date
- Organizing information so it's easily found and readily available
- Sharing information broadly while ensuring information security and privacy

Identify Knowledge

Identifying knowledge is the process of determining knowledge that needs to be transferred. The process of identifying knowledge begins with understanding your work.

Start by identifying your team's functions, which are major categories of work that define the accountabilities of one or more employees. Your team may be responsible for a single function or many functions. The primary function of an individual job is usually described in the overview section of a job profile. Some roles have more than one function, especially expert or leadership roles.

Functions can be broken down into activities, which are actions that contribute to accomplishing a function. Activities have an identifiable beginning and end and are normally described in the accountabilities section of a job profile. Think of activities and tasks that an employee does in their job.

Example Functions & Activities from Job Profiles

Title	Function	Activity
Correspondence Coordinator	Develop, or coordinate the development of written responses.	• Examines, edits and rewrites responses • Tracks correspondence
Customer Service Rep	Respond directly, by phone and email, to public inquiries.	• Inputs information into online or hard copy program files • Responds to inquiries regarding the status of requests
Business Analyst	Deliver cost effective information technology solutions to ministry program areas.	• Analyzes and documents business needs • Defines requirements • Conducts user acceptance testing
Operations Manager	Financial monitoring and budget management of programs and services	• Monitors financial reports • Consults with ministry financial office regarding budget requirements • Prepares and/or negotiate contracts • Authorizes contract payments

Consider what knowledge is needed to successfully complete the activities. For example, the Correspondence Coordinator may need knowledge of a correspondence tracking system, such as CLIFF. The Business Analyst will likely need to understand the business line processes and requirements to recommend and deliver responsive technology solutions.

Prioritize Knowledge

Once you have identified the knowledge required to perform the activities, the next step is to determine which knowledge needs to be prioritized for capture and transfer. Some considerations include: Is the knowledge essential to your team and/or operations? What would happen if your team no longer had access to the knowledge? Will this information be required to support future projects and/or future decisions?

Consider the Where Ideas Work corporate plan, Ministry Service plans, and your divisional or branch business plans. Your Strategic Human Resources office is your resource for workforce demographic information.

It's easy to feel overwhelmed when looking at all the knowledge required to perform a team's activities. A method to streamline the process is to apply the knowledge prioritization formula to the knowledge you have identified. The formula rates knowledge on three factors: importance, availability, and frequency. The ratings on these three factors are added together to determine the priority of the knowledge. The knowledge prioritization formula and the three factors are explored below.

Importance

Rating	How important is the knowledge to the organization
3 – Very Important	Transfer cannot be postponed, or primary activities will be impacted. Knowledge is critical to deliver on business objectives.
2 - Important	Transfer could be temporarily postponed without significant impact to operations.
1 – Somewhat Important	Transfer could be postponed for some time without impact to operations.

Availability

Rating	How available is the knowledge within the organization
3 – Rare	Knowledge required to perform the activity is rare and very few individuals hold it.
2 – Moderately Available	Other individuals within the organization have the knowledge required to perform the activity.
1 - Common	Multiple individuals across the public service have the knowledge to perform the activity.

Frequency

Rating	How frequently is the knowledge used in the organization
3 – Frequently	Knowledge is used more than once a week.
2 – Occasionally	Knowledge is used less than once a week and may be used weekly, monthly, quarterly or annually.
1 – Rarely	Knowledge is used only when a specific situation arises.

Once you have completed the importance, availability, and frequency rating, you can calculate the overall priority for this activity and related knowledge transfer. The knowledge priority rating can be manually calculated by adding the importance, availability, and frequency ratings together. The calculation can also be done through the knowledge transfer inventory template available in the knowledge transfer resources on MyHR.

Priority = Importance + Availability + Frequency

Priority	Score	Description
High	7 to 9	The knowledge is essential to achieving the organization's objectives; not widely available and used frequently. Actions should be taken immediately to capture or transfer knowledge.
Medium	4 to 6	The knowledge is less important to achieving the organization's objectives; may be more commonly available within the organization or may not be used as frequently. An action plan should be established to capture or transfer knowledge.
Low	3	The knowledge is not essential to achieving the organization's objectives; is commonly available and may be used infrequently or cyclical. Although it's low in priority, determine a plan for transferring knowledge. This may be the easiest to transfer.

Capture & Transfer Knowledge

Once the identified knowledge has been prioritized it can be captured and transferred through a variety of approaches, some of which are introduced below.

After Action Review	An after action review, also known as a post-mortem, is a structured and detailed evaluation of an event that recently ended. The process reviews the project/situation, what happened, why it happened, and how it could be done better in the future. A key principle of an after action review is that it's focused on learning, the team, and being more effective in the future. An after action review isn't about blame or fault finding.
Blog	Blog is an abbreviation of the term web log, which is an online website that hosts multiple entries or posts. There's usually a single author for a blog and the blog focuses on one or more topics.
Coaching	Coaching involves a professional relationship between an individual and coach that focuses on improving performance and seeks to enrich knowledge, skill-set, and competencies.
Community of Practice	A community of practice is a group of people who share an interest, subject matter, or problem. The group connects on a regular basis to share information.
Cross Training	Cross training involves an employee training another employee to do their work. This is often done to ensure there is coverage during employee absences and functions as a knowledge transfer approach.
Documentation	Documentation refers to any documents that contain knowledge. These documents create a record and include program reviews, best practices, job aids, and training guides.
Expert Listings	An expert listing is a list of employees with extensive knowledge or ability in a particular area that can be contacted to share and develop knowledge in other employees.
Formal Learning	Formal learning has the learning goals and objectives normally defined by the training department, instructional designer, and/or instructor. Formal learning is also called structured learning or synchronous learning.
Informational Interviews	An informational interview involves an employee who is new, less experienced, or unfamiliar with the subject matter interviewing one or several experienced employees and/or subject matter experts to learn more about a specific topic.

Job Aids	A job aid is a tool or other resource which provides the right amount of task guidance and support, at the moment of need, as part of work. Job aids reinforce key principles and steps in a process. They're an ideal tool when someone has learned a new skill and for frequently repeated tasks. Job aids can help an entire team if there is a significant change in procedures or processes.
Job Shadowing	A job shadow involves an employee partnering with a more experienced employee or an employee in a different area. The employee follows their job shadow partner through their normal work.
Leadership Transition Workshop	A leadership transition workshop is a facilitated session to help the incoming leader and team transition from the leadership of the departing leader in order to begin building new relationships. This process helps a team accelerate the process of transition and knowledge transfer following leadership change. Workshops can also be done by videoing a series of interviews with the departing leader that are shared with the new leader at regular intervals, i.e., day one, end of first month, end of 60 days, and end of 90 days.
Mentoring	Mentoring is when an employee shares their valuable knowledge and skills with one or more other employees by using coaching skills, telling stories, answering questions, and/or giving advice. Employees can participate in different mentoring relationships.
Orientation	Orientation occurs when an employee is new to the team and/or organization. An employee learns about their new role and responsibilities, their team and team function, and the organization. Orientation occurs through formal programs and informal learning.
Overlap	Overlap is when a replacement for an employee who is retiring, resigning, or going on a significant leave is hired before the person in the role has left. Both people are in the role for a period of time which allows for knowledge transfer. Overlap is also referred to as double banking or double bunking.

Peer Assist	Peer assist is a facilitated meeting or workshop where one or more peers share their experiences, insights, and knowledge.
Short Term Assignments	Short term assignments include temporary assignments, auxiliary assignments, and co-op assignments. Short term assignments can be used to support knowledge transfer in multiple ways.
Storytelling	Storytelling is the sharing of information, expertise, and experience through stories. Storytelling predates writing and holds an important place in many cultures.
Video and Audio Recordings	Video and audio recordings of experienced workers sharing their expertise can help capture and share knowledge. These recordings are commonly found on websites; for example, the Conference Board of Canada or loaded onto a YouTube-like resource where the videos are available across an organization and easily searchable. A current example is a podcast.
Wiki	A wiki is a website that allows staff, or members of a community of practice, to edit, add, and delete content. The most famous wiki is Wikipedia, the free online encyclopedia. The ability for multiple people to contribute to a wiki makes it an excellent platform for knowledge sharing.

The knowledge transfer resources on MyHR include worksheets on some of these approaches.

Considerations

The best approach for knowledge transfer will depend on the skill or knowledge being transferred, the time and resources available, the number of people involved, and the preferences of the people involved. A combination of approaches is often beneficial for knowledge holders and receivers. Some other considerations include:

- **Preferences** – How employees would prefer to share or receive knowledge. For example, some approaches may be done in person or virtually.
- **Context** – Your choice of knowledge transfer approach may be limited by contextual factors, such as whether you have approval to hire a replacement prior to the retirement of a knowledge holder.
- **Types of Knowledge** – Some types of knowledge, particularly around organizational awareness, lend themselves more easily to some approaches, whereas others may be more effective through different approaches.
- **Evolution** – Your work and technology are constantly evolving and so are knowledge transfer approaches. An internet search will give you access to a vast number of approaches.

Questions to ask your team:

- What approaches are best suited for capturing and transferring this knowledge?
- What experiences will the knowledge receivers need in order to be successful doing the key activities?
- What tools or format would help make this information easily available?
- Will the givers and receivers of the knowledge be in the same physical location? Will the knowledge transfer be done via telephone, email, or video chat?
- How will we know when knowledge is transferred? What are our measures of success?

Share & Store Knowledge

Once you've used a knowledge transfer approach to capture and transfer, the next steps are to ensure the knowledge is shared and stored. These steps are crucial to ensuring that the knowledge transfer work is of continual benefit to your team and the organization.

Knowledge that has been captured in the transfer process needs to be effectively stored and shared to ensure the work is of benefit and knowledge transfer continues. Additionally, responsibility for keeping the information current and easy to find needs to be assigned to someone on the team. Significant considerations for storage and sharing knowledge include information security and privacy. Where and how information is stored and shared must comply with information security and privacy requirements.

Questions to ask your team:

- Who needs the knowledge to deliver value to the organization?
- Who are the targeted users for the key knowledge that have been identified?
- Is it prudent for business, succession management, or other reasons to transfer this knowledge to multiple individuals?

When we transfer knowledge from a knowledge holder to a knowledge receiver, the knowledge may still be at risk. If the knowledge is particularly critical to achieving business results, you may want to consider methods that can transfer knowledge to multiple individuals. The type of knowledge, context, and confidentiality of the knowledge will help you determine how widespread the knowledge transfer should be.

Having a clear understanding of your team's strengths and areas for growth will help your team to prepare for key transitions on the team and proactively share knowledge. It's best practice to have regular one-on-one conversations with individuals on your team. The annual MyPerformance cycle and tools are another great opportunity to understand the strengths, opportunities, and risks for your team. More information can be found in the MyPerformance Guides.

Building a Knowledge Transfer Culture

There are many approaches to knowledge transfer with varying levels of formality, depth, and time. Regardless of the approach, you and your team will benefit from building a culture of knowledge transfer.

Some ideas to help build and strengthen a knowledge transfer culture include:

- Begin to identify knowledge of value and how it could be transferred
- Build in time during regular work weeks, projects, and business cycles to engage in meaningful knowledge transfer activities
- Communicate and support sharing goals regularly at the ministry and work unit level
- Train employees for systems and tools
- Highlight success stories
- Practice sharing behaviour at all levels of the organization and make activities visible
- Recognize and reward good knowledge sharing behaviours
- Encourage community development and activities

Key Terms for Knowledge Transfer

Critical Knowledge: Knowledge that's essential to business operations, growth, and sustainability. If this knowledge is lost, there's a business risk and impact on operations.

Employee Knowledge Lifecycle: The lifecycle considers all stages that an employee passes through in their career and/or role. When looking at knowledge transfer within a team, it's important to consider where each team member is in the lifecycle.

Exchange Approach: Knowledge transfer approach where knowledge is transferred directly from the knowledge expert to a learner or learners.

Explicit Knowledge: Knowledge that's easy to articulate, communicate, and store. It's easily accessed and shared with individuals as it can be clearly recorded and documented.

Job Activities: Job activities are actions that contribute to accomplishing a function. Activities have an identifiable beginning and end and are normally described in the accountabilities section of a job profile.

Job Functions: Job functions are major categories of work that define the accountabilities of one or more employees. The primary function of a role is usually described in the job overview section of a job profile. Some roles have more than one function, especially expert or leadership roles.

Knowledge Capture: Collecting knowledge in a permanent manner that allows it to be stored and then made available. Knowledge capture can be done in a variety of ways.

Knowledge Holder: A knowledge holder is someone who has expertise in an area. Usually, they have both explicit and tacit knowledge of the subject matter. They can also be known as subject matter experts.

Knowledge Receiver: The individual or group of individuals receiving the knowledge through knowledge transfer.

Knowledge Sharing: Knowledge sharing involves making the knowledge readily available while ensuring privacy requirements are met.

Knowledge Storage: Knowledge storage is the way knowledge is preserved and accumulated.

Knowledge Transfer: The process of sharing and distributing knowledge to one or more specific individuals and/or to other parts of the organization.

Push/Pull Approach: Knowledge transfer approach where knowledge is captured and stored as information for later access; for example, audio recordings or wikis.

Tacit Knowledge: Knowledge that's hard to articulate, communicate, and store because it's usually not written down or captured. It's embedded in individuals from their experience and involves intangible elements, such as personal beliefs, perspectives, and values.