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Every employee has a wealth of knowledge to offer, and systems must exist where this knowledge can be transferred to someone else.

One of the major concerns haunting every corporation is how to capture human knowledge, experience, and expertise before it walks out the door. When employees retire or accept employment elsewhere, they leave with detailed information or "history" that is often difficult to transfer to their replacements.

This knowledge or human interpretation of people, processes, products, services, and client relationships is undoubtedly invaluable to determining future actions for those that carry on the legend and continue the practices of any organization. Although a wealth of data is stored in computer systems, even the most sophisticated computer systems cannot reveal human interpretation for potential action, also known as interpretive thinking: "the ability to do more than recite what was said; going further than parroting information; adding one's own opinion to the information being displayed."

Crossing the barriers of interpretive thinking can occur only in environments where human beings are recognized as having the central role of knowledge creation, where information is gathered and recorded continually, hence the term knowledge management.

What items should be included in the knowledge management process? Key elements are the company's history, specific procedures and processes an employee follows, and the working environment.

A company's history
Vast amounts of useful information can be found in a company's history including changes in corporate hierarchy, policy changes, product success and failures, and process revisions. This information provides assistance in determining plans for products and/or services, without repeating unnecessary costly errors or wasting time.

More importantly, this information can assist new hires, regardless of position, in learning the company's history, such as what individuals were behind the greatest successes, the creation of products, the design of the infrastructure, growth, losses, and changes in the organization. Many individuals refer to the company history as the "treasure map" because of the opportunity for uncovering valuable information.

Procedures and processes
Consider the wealth of information you have been exposed to, and multiply that by the number of years you remained in any organization or position, and imagine trying to convey that to someone following in your footsteps. You have mastered many processes and procedures and are likely able to perform some of them robotically or subconsciously at times. Transferring that information requires becoming consciously aware of every thing you do and know.

Identifying the elements is a good place to start. These elements include:

- Specific procedures you follow
- Written documentation included in your role
- Key activities you perform
- General outline of daily, weekly, and monthly duties
- Minimum skills needed to perform the job
- Educational requirements
- Experience necessary such as key technology systems, processes, etc.
- Skills and abilities as related to mathematical needs, verbal and written requirements, reasoning/troubleshooting skills, and physical requirements
- Key relationships such as direct contacts, direct reports, and people you communicate with regularly and sporadically

Working environment
To transfer the picture fairly, you also must include information related to the working environment, keeping in mind that you probably have become immune to some of these items:

- Amount of stress related to this position
- Level of noise that is present daily
- Exposure to hazards, regardless of how safe the environment is
- Factors related to isolation, if any
- Resources available including materials, people, and infrastructure

It also is important to document commitments you make to meetings, teams, and projects.

Establish a documentation trail

Creating a documentation trail is the next step. Some organizations have created their own "yellow page" type of directory to assist employees in knowing the skills and backgrounds of the organization's human assets. In this directory, each employee is listed along with a picture and biography that includes education, work history with the current organization, previous employers if valuable to the current organization, career highlights, special skills, and unique project knowledge or experience. This database then can be sorted to aid in locating a person best suited for internal needs as they arise.

A similar database can be created for processes, strategies, objectives, organizational culture, and core values.

Role of communication

The documentation trail is dependent upon your ability to identify details. The following unrelated question demonstrates this point:

Question: How has the Internet affected the young adults of today? Write your answer on a piece of paper in bulleted points. Now, take a look at your answer. How much of your answer was based on fact vs opinion?

Opinion might include the following:

- Young adults use the Internet only to play games and chat in chat rooms.
- All young adults using the Internet will eventually isolate themselves from society and become depressed and introverted.
- The Internet is breeding a generation of nonsocial robotic people.

Fact would include the following:

- 67 percent of Americans ages 18-24 live in households that use the Internet to access essential information
- Almost 83 percent of new freshmen at American colleges (4 out of 5) say they are using the Internet for research and homework.
- 47 percent said they would consider taking an educational course through the web.

According to Webster's dictionary, the following definitions exist for opinion and fact: Opinion = view, judgment or appraisal formed in the mind; Fact = something that has actual existence, reality, or truth.

The point of this exercise is to help you see the value of documenting only the facts related to your role, not your opinion of the duties, role, responsibilities, etc.

Separate fact from opinion
To separate fact from opinion, you need to remove the emotion from your commentary, remain objective, and think outside the box.

Stored information can be turned into useful and valuable tools when an individual is challenged to begin looking at the same picture a different way. This is similar to the drawing many of us have seen where viewed one way, a young beautiful woman is visible, and after studying the picture for a few seconds, an image of an old, witch-like woman appears. Taking an objective look at the same information can produce different perspectives.

Employees are people, and people become immune to maintaining greater perspectives on those functions they perform routinely. The synergy needed between data and people can come from the person least likely to come across the data in any other part of his job.

I was working as a consultant in an organization and happened upon some information related to the sales and marketing department. The information included clients, products sold, and total sales dollars. The information was provided to me as a matter of record, but I chose to inspect it for new insight into the overall picture to enhance my effectiveness on the project. Looking at this information objectively, I began to draw unbiased conclusions and shared those conclusions with the sales/marketing department. In doing so, I presented information that influenced future product decisions. Unknowingly, I had assisted them through my objective view.

Beyond the job description
How objective can you be in describing your job beyond the job description? Let's try another

exercise to demonstrate this point. We will use the role of a receptionist since most individuals are familiar with this role. A job description for this position might be as follows:

Essential duties and responsibilities: Answers phone, greets visitors, handles walk-in job applicants, maintains an inventory of front office supplies, and restocks supplies when needed. Hours: 9 to 5 Monday-Friday

Qualifications: Extroverted personality, good phone skills, and able to perform basic mathematics

Duties NOT mentioned: Proficient with computer and e-mail, multiple task expert, flexible on work hours, exceptional organizational skills, stress free/positive attitude, jack-of-all-trades.

The point is this: in order for you to transfer what you know, you have to look at the overall picture, not just the job description.

The pertinent relationship is 50 percent collecting and recording data and 50 percent interpreting what has been collected. Then document what you have collected.

Using a knowledge transfer journal
You can purchase an existing journal or create one yourself. Either way, you should have both a manual version and an electronic version, using the manual version to jot down thoughts or comments as they arise, eventually entering the data into the electronic version. See accompanying section "What To Include in a Knowledge Transfer Journal."

On an ongoing basis, send out questionnaires and surveys periodically to document and assess knowledge. Share these results with everyone.

Train your replacement
The shadowing process is the best method for training a replacement because it provides a

direct opportunity to transfer knowledge from one person to another through actions as well as words. Side-by-side study allows for more observation vs explanation, and makes the tasks or duties being observed more easily understood. Once the observation is completed, a debriefing process should take place in order to determine what questions remain unanswered. Assessing the learning experience then becomes the last step in which the new hire, or person new to the position, can actually apply what was observed, and uncover where assistance may still be needed.

In the shadowing process, the objective is to capture the "who, what, when, where, and why" of the job. It provides for an opportunity to share solutions that help solve everyday work issues, and to focus on useful bits of information that can be easily digested and retained.

During this interactive process where participative training takes place, the employee conducting the training can assess the variables in the new hire's skill set, and adjust as needed to fit those variables.

It is imperative, however, to monitor the saturation level—the point at which it becomes apparent that your protégé exhibits less energy and interest than witnessed prior to this time. Keep in mind that a new hire, or person new to the position, is not likely to openly share when he or she feels overwhelmed or saturated with information. It can be difficult to learn as well as decipher what value each observation has while taking notes, especially when trying to make a positive impression.

The communication process

In training any replacement, the communication process or "effectiveness of the communications" is what determines the success of the training itself. One of the greatest challenges in communicating what you know is recognizing that your perspective, mind set, and expectations have likely been skewed by your experiences.

In addition, your personal feelings, past experiences, and values also have played a role along with degrees of respect related to title, authority, and credibility. Freedom to respond and environmental issues such as noise, interruptions, and privacy, along with cultural barriers, all can affect your ability to drive the communication process. These factors coupled with the trainee's own communication barriers can easily spell disaster.

See accompanying section "Ensuring Communication" to see the steps you can take to ensure positive communications during the training experience.

Attitude sells it all

Maintaining a positive mindset during the training process is critical to the success of the experience as well as the transferring of knowledge. Two critical points include:

- Incorporate the truth. Be honest about co-workers, vendors, and customers. Avoid making excuses.
- Set up for success. Eliminate complaining and/or negative commentary. Keep personal matters out of the equation, and take initiative. Be the motivator.

Remember that individuals perform at their best when their surroundings are positive and non-threatening. Those who are the most involved with each process are the most likely to create the greater product. Establish a solid procedure for the utilization of new ideas.

Keys to ongoing success of knowledge management

Managing and sharing knowledge will occur naturally in organizations if the following practices are applied:

- Create groups of internal and external networks. Socialization of relative interests can create innovative ideas and opportunities for information sharing. Strengthen networking groups by using facilitators who can encourage and massage ideas into reality.
- Establish synergy between data and people. Human interpretation of information is where the synergy begins. Opinions will enable organizations to add value to the bottom line.
- Generate ideas from stored data. Challenge your staff to use recorded information to create new ideas. Break the routines of patterned thinking—doing things the same way. Objective parties should periodically review data. Objective perspectives can add insight.

Employees viewed as human assets are the center of knowledge creation. Every employee has a wealth of knowledge to offer, and systems must exist where this knowledge can be shared. Rigid rules and limited parameters will keep the thinkers in the box. Above all, remember that information is worthless without interpretation. **MT**

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