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Name	ACTION REVIEW
Description	<p>The key purpose for doing an Action Review (AR) is to help a team learn and quickly apply the learning in real time to improve their current performance.</p> <p>An Action Review is a quick and simple team-learning process carried out while work is being performed, usually during a break in a process, activity or task. It is intended to help teams 'learn there and then' and transmit knowledge immediately into the work at hand, as opposed to learning after a major project or activity has been completed. All it takes to begin running an AR is a commitment to open discussion, a little time, and paper and pencil to record the results.</p> <p><u>Participation</u> For an AR to be a successful discussion, it is imperative that:</p> <ul style="list-style-type: none"> • Only those involved in the event participate. • There are no spectators; everyone there participates. • Everyone is on an equal footing in the learning process —no hierarchy.
Expected benefits	An AR is designed to identify key lessons and immediate actions quickly for both the team and individuals, and to build relationships, trust and confidence among team members.
Context of use	<p>ARs are designed to reveal and address real issues and "learnings" surrounding a team event —what the U.S. Army calls "Ground Truth." Therefore, it is important that the facilitator guide the conversation to the real and sometimes unspoken issues.</p> <p>The facilitator may be the team leader or an external observer. If external, he/she must be a respected practitioner in the processes of the event and should have been a close observer of the actual event as it unfolded.</p> <p>Finally, the facilitator should ensure that the process is quick and simple —an effective AR can be carried out in 15 to 30 minutes.</p>
Methodology	<p>The framework for the AR discussion is divided into 3 phases with 4 simple questions to be answered.</p> <p><u>1. "What was supposed to happen?"</u> Everyone shares his or her own understanding of what should have happened. This is often the most revealing part of the process. Unless the event had a clear, unambiguous, and well-communicated purpose and plan, it is likely that each member of the team had a different understanding of what was actually supposed to happen.</p> <p>Suggestion for the facilitator: Ask people to quickly write down their personal understanding of what was supposed to happen. Then, after a maximum of two minutes, ask them to read what they wrote to the group.</p> <p><u>2. "What actually happened?"</u> Establish the facts about what actually happened (the ground truth). The ground truth is used to identify a problem, not a culprit. Save analysis and interpretation for the next two questions, which focus on the facts.</p>



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	<p>3. <u>"Why were there differences?"</u> and 4. <u>"What can we learn and do different right now?"</u></p> <p>The real learning begins when you compare the plan to what actually happened. Successes and shortfalls are identified and discussed. Agree to create action plans to sustain successes and help remedy shortfalls immediately.</p> <p>Suggestion for the facilitator: Ask people to quickly write down one key point they will take away from the meeting. Often, the act of writing it down helps participants focus on what is important and will help them retain what they learned for future events.</p> <p><u>Open atmosphere</u></p> <p>The key to successful ARs is open and frank discussion. The goal is to learn and fix the problem, not to blame. Accordingly, ARs are learning events, not critiques or evaluation events. This may require some demonstration by the leader of the team at the beginning of the discussion.</p> <p><u>Facilitation</u></p> <p>Most importantly, the facilitator of an AR must ensure that the meeting is open and blame is not brought into the process.</p>
Limits for SMEs	<p>The Action review should be planned immediately after a natural break in any work activity. For example, after a proposal meeting with a customer or after an operations team has completed a work shift. The AR should fall within the time allotted for the event. It should not appear as an add-on or extra work. An AR should be carried out when:</p> <ul style="list-style-type: none">• Memory is fresh and unvarnished.• Participants are still available.• Learning can be applied immediately.
Examples and experiences	<p>The U.S. Army began using this method in the early to mid 70s. There are some guides published by the <u>U.S. Army</u>.</p>



	COMMUNITY OF PRACTICE
Description	<p>The “Community of Practice” (CoP) is a practice-related community of people who are informally associated with each other and have similar interests, face similar problem situations, or have similar tasks. These are not classic “working groups”. The term “community” can refer to both a physical and a virtual community.</p> <p>The aim of a CoP is to create a lively exchange among participants, such as employees or other interest groups. With regard to employees, this involves both knowledge from databases and experts and the development of skills and creativity through which an extensive knowledge transmission can take place. Individual learning processes are interlocked with those of the community and its development. At the same time, changes take place in this community, which have an effect on the individual learning process.</p>
Expected benefits	<p>A Community of Practice that is integrated into the company offers several advantages. First, the exchanges improve the skills of the members —e.g. quicker problem solving and a wider range of competences. It also has a supporting effect where there are new solution approaches, innovations or “best practices”. Furthermore, the CoP can also provide opportunity for the development of new business areas.</p>
Context of use	<p>In situations where employees have developed implicit (often specialised) knowledge or skills that have not been written down or recorded and thus cannot be transmitted to other employees.</p> <p>The form of the CoP is focused on its members, who in turn focus on the direction of the community. Thus a distinction can be drawn among,</p> <ul style="list-style-type: none"> • CoPs that are purely internal within a company and CoPs with the involvement of external members/knowledge carriers, • CoPs with few and mainly active members and CoPs with many active or passive members or subgroups, • Purely informal CoPs and CoPs that are officially integrated into the company, etc.
Methodology	<p>CoPs are largely self-organised with exchanges and mutual support. CoPs are identifiable from the following three dimensions (cf. Wenger 2004, pp. 73 ff.¹):</p> <ul style="list-style-type: none"> • Mutual engagement • Joint enterprise • Shared repertoire <p>Further skills are developed from this latter dimension, which are established over the course of time. Three types of communities are distinguished:</p> <ol style="list-style-type: none"> 1. Socially-based CoPs (original form), 2. Professionally-based CoPs (setting targets with the people, exchanging information and creating contacts, directed towards employed people who form learning networks, networks of experts)

¹ Wenger, E.: Communities of Practice: learning, meaning, and identity. Cambridge University Press, Cambridge 2004.



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	<p>and so-called “knowledge communities”) and</p> <p>3. Commercially-based CoPs (realisation of profits and monetary benefits).</p>
Limits for SMEs	<p>This methodology is particularly useful for SMEs because it does not depend on the number of participants, requires no tools such as ICT applications and no formal organisational/administrative facilitating.</p> <p>Obstacles or difficulties may be that certain expected or desired results do not occur or do not occur in a specific way, that there is no success or only limited success and that this is measurable in a quantitative way. Another frequent obstacle in addition to the lack of time, is the low level of appreciation of CoPs.</p>
Examples and experiences	<p>This method can be a part of the process bringing implicit knowledge to the surface to make sure it becomes reproducible for other employees.</p>



	CROSSED SELF-CONFRONTATION INTERVIEW.
Description	<p>This is a method stemming from the self-confrontation interview.</p> <p>The crossed self-confrontation interview is the confrontation after the fact of an employee in one of his/her recorded working activities (video, sound) and with one or more of his/her peers. The psychologist Yves Clot originated this concept by chance. The crossed self-confrontation interview provokes professional controversies (confrontations of points of view, knowledge and representations of work) which enable the gathering of best practices.</p> <p>The purpose of this method is similar to that of the self-confrontation interview that brings to light knowledge and operational skills —the employee's logic of action.</p> <p>Crossed self-confrontation interviews generally come after self-confrontation interviews. Yves Clot noticed that, in self-confrontation interviews, the dialogue between peers filmed by one of them brings knowledge and implicit skills to the forefront. Peers using the same language they use on the job say more things to one another than to a consultant who does not know their job.</p> <p>The wealth is to be found in the interactions: —peers confront their knowledge and know-how and become enriched by the experience.</p>
Expected benefits	<p>The expected results are those of a self-confrontation interview plus the contribution of the exchanges between peers. Professional controversies question the knowledge and operational know-how of each peer, allowing them to become up-to-date and enriched by the experience.</p> <p>The crossed self-confrontation interview allows to identify the employee's implicit skills and knowledge, making them explicit through the exercise for each of them. This method allows them to create different ways of managing situations with an array of action strategies. The data then has to be capitalised so it can be shared with the others.</p> <p><u>For employees:</u></p> <ul style="list-style-type: none"> • Through this exercise in which employees examine what they are doing and become aware of what they sometimes do without realising that they are doing it. The employee can then conceptualise his/her logic of action. Furthermore, exchanges with peers allow each of them to become aware of their work and their identity within their work. • They acquire new skills and know-how enabling them to analyse their own activities to then be able to strengthen them and make them more efficient. They exchange and share practices and learn from others. <p><u>For companies:</u></p> <ul style="list-style-type: none"> • Having more competent employees who pass on their experience and who develop their skills. • Defining best practices. • Capitalising on knowledge and implicit know-how and consolidating it to develop and share knowledge and know-how.



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	<ul style="list-style-type: none"> • Better performance.
Context of use	The crossed self-confrontation interview is used in analysing working situations that are considered critical or sensitive by the company in terms of skills. The junior/senior context is useful.
Methodology	<p>The consultant will have viewed the filmed session to look for salient aspects supporting his/her notes taken during the interview and while observing the subject at work. He/she will attempt to analyse the complete working sequence with the employees so they can validate the indicators which they use as a basis for their actions. The role of the consultant is crucial in bringing the real work, knowledge and skills of each employee to the forefront.</p> <p>The consultant who practices this method is a facilitator. He/she supports the exchanges but remains in background during interactions between peers. He/she will formalise what they say in writing while recording them (video and sound), to determine the logic of action and the indicators that serve to support the decision-making process.</p> <p>The employee sees himself/herself confronted by one or several peers. The atmosphere of the meeting is crucial. It should be friendly and non-judgemental. The employee should be invited to explain each of his/her actions. A game of questions and answers between the employee and his/her peers allows for the logics of action to appear.</p> <p>The conditions of the crossed self-confrontation interview are also important. A quiet room should be made available and they should not be disturbed. The consultant should be competent in this method and be ethical and the employees should be taken out of their job.</p>
Limits for SMEs	<ul style="list-style-type: none"> • A consultant is necessary to analyse the working situations. • There needs to be an agreement to film the employee. • Enough time should be made available for the employees to go through the crossed self-confrontation interview. • There should be a quiet room available for the interview.
Examples and experiences	The crossed self-confrontation interview is used in France by researchers and job analysis practitioners.



DOUBLE'S INTERVIEW	
Description	<p>The interview with your double is a method which was developed at the FIAT automotive company in the 1970s by an Italian occupational psychologist, I. Oddone.</p> <p>The idea is to help employees clarify what they do in their jobs by pretending to prepare the interviewer, who is their double, to replace them in their job without their co-employees realising it.</p>
Expected benefits	<ul style="list-style-type: none"> • Emergence of implicit skills and logic of action of the employee → Revelation of professional skills and knowledge which can be crucial for the company. • Employees' awareness their strategies of action, intensification of their skills, acquisition of new skills as the capacity to analyse their work. • Formalising, capitalising and sharing knowledge and skills. • Company's understanding of what the job is really like, vis-à-vis prescribed work. • A way for the company to appropriate and take advantage of knowledge capitalisation.
Context of use	<p>This kind of interview is employed in the transmission of crucial skills at a time when baby boomers are retiring while young employees are not yet fully trained.</p>
Methodology	<p>The double's interview is a particular kind of interview between an employee and an interviewer (who may be a consultant or a colleague) who asks the employee to explain everything that is required to do his/her job so the interviewer (who is supposed to be the interviewee's double) can replace the interviewee without anyone realising it.</p> <p>The instructions given are as follows: "Imagine that I am your double and that tomorrow I have to replace you in your job. What instructions should you give me so that nobody realises that you have been replaced?"</p> <p>The employee should explain the tasks to be carried out by his/her double and provide his/her logic of action. The consultant needs to question the employee to get the details of his/her work and formalise the logic of action of the employee in writing.</p> <p>The knowledge acquired from the interview can then be used in training or self-training and skills transmission. This helps the company better capitalise its knowledge.</p>
Limits for SMEs	<ul style="list-style-type: none"> • The double's interview requires sufficient time so it can be carried out and a quiet room for the interview. • Consultants employing this method will need to thoroughly analyse employee statements to determine the indicators on which decisions are based.



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Examples and experiences	<p>The double's interview was used at FIAT, the car manufacturer, in the 1970s.</p> <p>It is commonly used by researchers and job analysis practitioners in France.</p>
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	INTRANET
Description	<p>Large companies are rapidly adopting the use of intranets to ensure that information is accessible to every employee in the company whenever they need it. These companies are utilizing various solutions to gain a significant competitive advantage regarding sharing data amongst employees. Small companies can obtain the same competitive advantage by implementing an Intranet.</p> <p>What is an intranet? An intranet is a private computer network that uses Internet Protocol technologies to securely share any part of an organisation's information or network operating system within that organisation.</p> <p>A company intranet is a private, secure website that enables employees to communicate, collaborate, share documents and other information, and access productivity tools. An intranet is often hosted and maintained on company servers and can only be accessed by internal employees. Recently, intranets have been used to enhance customer relationships as web-accessible extranets or customer portals. Companies have two intranet options:</p> <ul style="list-style-type: none"> • a custom-built intranet • an ASP (hosted) intranet <p>Custom-built intranet The first option is creating a bespoke in-house intranet. Although this approach allows companies to build a highly specialised intranet, it involves huge costs and effort, which makes it unsuitable for growing companies.</p> <p>(Hosted) ASP intranet The second approach is the ASP (application service provider) or software-as-a-service approach. Rather than having to set up in-house servers and hiring expert staff for long months of implementation, users can simply access all the tools they need to build their company intranet over the web. This is commonly known as an "ASP intranet" or "hosted intranet" or "SAAS intranet". This approach provides a low-cost, standardised intranet.</p> <p>Extension into Extranet A customer portal is a private, secure website that enables businesses to share documents, calendars, and project information with customers. Commonly known as a customer extranet, a customer portal enhances customer relationships by providing complete 24x7 access to collaborative tools with just an Internet connection. Extranets extend a private network onto the Internet with special provisions for access, authorisation, and authentication. Your customers get access to the most reliable, accurate, and up-to-date information.</p> <p>Intranet developments Increasingly, intranets are being used to deliver tools and applications, e.g., collaboration (to facilitate working in groups and teleconferencing) or sophisticated corporate directories, sales and customer relationship management tools, project management etc., to advance productivity. Intranets are also being used as corporate culture-change platforms. For example, large numbers of employees discussing key issues in an intranet forum application could lead to new ideas in management, productivity, quality, and other corporate issues.</p>



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Expected benefits	<ul style="list-style-type: none"> • Workforce productivity: Intranets can also help users to locate and view information faster and use applications relevant to their roles and responsibilities. With the help of a web browser interface, users can access data held in any database the organisation wants to make available, anytime and —subject to security provisions— from anywhere within the company workstations, increasing employees' ability to perform their jobs faster, more accurately, and with confidence that they have the right information. It also helps to improve the services provided to the users. • Communication: Intranets can serve as powerful tools for both vertical and horizontal communication within an organisation. From a communications standpoint, intranets are useful to communicate strategic initiatives that have a global reach throughout the organisation. The type of information that can easily be conveyed is the purpose of the initiative and what the initiative is aiming to achieve, who is driving the initiative, results achieved to date, and who to speak to for more information. By providing this information on the intranet, staff have the opportunity to keep up-to-date with the strategic focus of the organisation. Some examples of communication are chat, email, wikis, forums and blogs. • Web publishing allows company knowledge to be maintained and easily accessed throughout the company using hypermedia and Web technologies. Examples include: employee manuals, work task descriptions, company policies, business standards, newsfeeds, and even training, can be accessed using common Internet standards (Acrobat files, Flash files, CGI applications). Because each business unit can update the online copy of a document, the most recent version is always available to employees using the intranet. • Business operations and management: Intranets are also being used as a platform for developing and deploying applications to support business operations and decisions across the internet-worked enterprise. • Promote common corporate culture: Every user is viewing the same information within the Intranet. • Enhance Collaboration: With information easily accessible by all authorised users, teamwork is enabled.
Context of use	<p>An investment in an intranet is not a one-time expenditure. The initial outlay for the installation and for ensuring that it is functioning to design specifications, will take a significant portion out of your budget. If you do not have the expertise to build and/or install an intranet, you will have to set aside funding for an IT technician who specialises in building intranets. In addition, you will need to allocate some money for features and general maintenance.</p> <p>Will you have the in-house technical expertise needed to deal with any problems that may occur? This is another factor to contemplate as the idea of establishing an intranet is considered. The inability to instantly remedy any glitches that may arise on a day-to-day basis might leave the company paralysed and erect barriers to vital information. Access to outside IT support can be costly but are necessary if you do not have the expertise inside your own company.</p>
Methodology	<p>Most organisations devote considerable resources to planning and implementing their intranet as it is of strategic importance to the organisation's success. Some of the planning would include topics such as:</p> <ul style="list-style-type: none"> • The purpose and goals of the intranet • Persons or departments responsible for implementation and



	<p>management</p> <ul style="list-style-type: none"> • Functional maps, information architecture, page layouts, design. • Implementation schedules and phase-out of existing systems • Defining and implementing security of the intranet • How to ensure it is within legal boundaries and other constraints • Level of interactivity (e.g. wikis, forms) desired. • Is the input of new data and updating of existing data to be centrally controlled or devolved. <p>These topics are additional to the hardware and software decisions (like content management systems), participation issues (like good taste, harassment, confidentiality), and features to be supported.</p> <p>The actual implementation would include steps such as:</p> <ul style="list-style-type: none"> • Securing senior management support and funding. • Business requirements analysis. • User involvement to identify users' information needs. • Installation of web server and user access network. • Installing required user applications on computers. • Creation of a document framework for the content to be hosted. • User involvement in testing and promoting use of intranet. • Ongoing measurement and evaluation, including through benchmarking against other intranets. <p>Useful components of an intranet structure might include:</p> <ul style="list-style-type: none"> • Key personnel committed to maintaining the intranet and keeping content up-to-date. • Social networking is useful as a feedback forum for users to indicate what they want and what they do not like. <p>Nowadays intranets are often static sites, basically they are essentially a shared drive, serving up centrally stored documents alongside internal articles or communications; often one-way communication. However more and more intranets changing from static sites into being a 'communication hub' for their team. There are companies that are specialised in 'socialising' intranets.</p>
Limits for SMEs	<p>All the planning in the world for an intranet can be wasted if top management does not see a need for the solution. Top management has to see the key benefits of investing in an intranet.</p> <p>How much is this going to cost us? - An investment in an intranet solution will depend on the number of users and the functionalities we need to get the job done correctly.</p> <p>IT-staff might be limited in SMEs. Still IT-staff is necessary to maintain the intranet. Also, the maintenance of the information stored and published on the intranet need to be secured. There should be a staff member that has the time resources to concern himself or herself with the information on the intranet. If this does not happen, the intranet will be outdated soon and the intranet will be counter-effective.</p> <p>Intranet solutions are not for big corporations any more. Intranets can give small businesses the power to store, share, and disseminate information within their companies to gain a competitive advantage when it comes to business intelligence. It is the responsibility of the individuals who will use the application to evaluate the company's needs, wants, and the environment to see if the presence of an application will be a perfect fit.</p>
Examples and	



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experiences	
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	JOB ROTATION
Description	<p>As the term suggests, job rotation is concerned with the action of enabling employees to switch job roles or functions for a period of time. The overall goal is to develop individuals so that they have expanded their skills, knowledge and experience by the end of the process.</p> <p>It involves a systematic change of positions according to certain predetermined rhythms and procedures. The purpose is to enlarge or enrich the job and to develop and deepen specialised knowledge and experience. The introduction of group or team work can be helpful here although it is not a prerequisite.</p> <p>Job rotation has several forms. One of them, called 'on-the-job training', involves moving employees from one job to the next within the same company. The goal is to enhance employee interest and motivation.</p> <p>The second major form of job rotation involves allowing certain employees to undergo training outside the company without disrupting work processes. Thus, employees are replaced by new employees who carry on their tasks.</p> <p>This tool allows new employees to acquire skills and knowledge through working experience and experienced employees to improve their professional competences, thereby increasing the company's competitiveness (while an employee is taking part in a re-qualifying training process, an inexperienced employee, previously trained, takes over his/her job).</p> <p>This model was created in Northern European countries in the middle of the 1990s to provide the training flexibility required by companies and human resources departments.</p>
Expected benefits	<p>Job rotation can improve employees' skills and competences through training, involve new employees in the company as replacement employees, etc:</p> <ul style="list-style-type: none"> • Older employees improve their professional competences thanks to their participation in a training process that provides a real answer to the needs of their job. • Substitute (inexperienced) employees have access to a quality training process and a subsequent real working experience, increasing their chances of getting a job when the company needs new employees. • Companies gain human resources adapted to new professional demands. This may result in an improvement in productivity and competitiveness. The training process does not influence the productive system, as absences are covered by substitute employees. In addition, if companies need to hire employees, they have pool of employees they already know to choose from. • By moving trainees from one role to the next, job rotation can be a great way of strengthening team cohesion with a finance function. • The company also acquires a reputation as a good employer which develops its employees. • Training needs analysis is linked to the company development plan.
Context of use	<ul style="list-style-type: none"> • It is important to sell the benefits of job rotation to the participants in the wider context of a path to qualification and their personal career



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	<p>map.</p> <ul style="list-style-type: none"> • The whole process needs to be transparent. There must be clarity in terms of what the rotation is meant to achieve and why particular individuals have been selected to participate. • Clear timescales should be agreed upon for the rotation, with opportunities for trainees to move back into their pre-rotation positions at the end of the development activity. • Learning objectives and expected performance levels associated with rotation should be established within the context of practical experience requirements and embedded within your organisation's performance appraisal review framework. The performance appraisal review process should be used to track and rate performance.
Methodology	<ul style="list-style-type: none"> • Consultancy service: Survey and analysis of the working environment in which the processes will be developed. • Design of training plans, tailor-made for the identified jobs. The methodology used for the identification of training needs and the subsequent design of the training plans will be Management by Competences. • Participant selection (substitute employees and employees to be retrained). Selection is carried out by means of personal interviews, choosing the most suitable people in terms of learning potentiality and technical skills. In the selection attitude aspects (willingness towards the program) and aptitude aspects are combined. • Development of the training process for the substitute employees. The training actions will meet the competence model, as the set of knowledge, skills and aptitude required to carry out a given job and be able to solve the professional problems in a flexible and autonomous way. • Rotation period. Period for substituted employees to tutor their substitutes. Tutoring should be the responsibility of the employees being substituted and they should be allowed to approve their substitutes. <p>The methodology for this training process aims to integrate the different vocational training areas to foster job fulfilment:</p> <ul style="list-style-type: none"> - Training area: focused on the acquisition of the technical-professional skills to be used in the work, as well as acquiring key horizontal competences, common to many sectors, jobs and occupations. - Psycho-social area: focused on the acquisition of social skills and on recovering and/or acquiring skills for the working field, such as responsibility, team work, conflict resolution, etc. - Working area: focused on the acquisition of real practice and professional experience, getting in contact with the organisational environments typical of the companies.
Limits for SMEs	<ul style="list-style-type: none"> • More suitable for medium and large companies because sending employees for training may involve long periods of absence from work; • Top management seldom takes part in job rotation as it is difficult to replace managers with inexperienced employees; • High costs of training of staff and substitute employees
Examples and experiences	<p><u>Glen Royal</u> <u>Newmilns Snow & Sports Complex (NSASC)</u></p>



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Name	KNOWLEDGE CAPTURE
Description	<p>Knowledge capture is a very common method of transmitting knowledge. While it is often not the most effective method, it is the most visible and easy to understand. After all, libraries (real or virtual) are full of books that have contributed greatly to our base of knowledge.</p> <p>Knowledge capture is process that involves identification, elicitation, distillation, packaging and publishing. (Note: The elicitation and distillation steps are fairly complex and have their own guides to help in their application.) It is laborious and time consuming. But, when done right, it can enable knowledge to move from one to many regardless of time and space.</p>
Expected benefits	<p>Using the knowledge capture method, the company can benefit in a lot of ways. Some of them, directed to younger employees, are:</p> <ul style="list-style-type: none"> • If captured knowledge and relevant content is not found on the first page of results from a search on Google, a Gen Yer will either stop looking or perform another search. There's a good chance they will not go to the next pages of search results to find what they are looking for. • Stories take too long and are not something Gen Yers seem to need to make sense of knowledge that is being offered. "Get to the point and tell me what I need to know, then ask me if I need more context," was a common request from that generation. • Knowledge in the form of 'bite-sized chunks' or 'nuggets' has the best chance of being read or ingested by people in all generations. It provokes your curiosity to make yourself search for an additional information.
Context of use	<p>Often the level of effort to capture knowledge gets in the way of it happening. Imagine you have just completed a project and learned something new that you think your fellow practitioners might find useful but you do not have the energy or motivation to document this in a manner that you think it would take for someone to really understand what you did and learned. In this case, a Knowledge Capture One Pager Template (used in the Knowledge Self-Capture Method) can be used to capture just enough about some important knowledge or experience to prompt someone to reach out to the source and find out more.</p>
Methodology	<p>The following steps are provided to guide knowledge harvesters through the main activities necessary to harvest and capture knowledge for re-use and adaptation by others:</p> <ol style="list-style-type: none"> 1. <u>Identify a customer for the knowledge</u>. Have a clear —current or future— customer in mind when considering the need to capture knowledge. Who will use the knowledge, what needs will it address, and how will people access it? 2. <u>Identify a community of practice relating to this subject</u>, whether one exists or not. Practitioners will be the source of the knowledge in the first place, the users of the knowledge in future, and the people who validate the captured knowledge. If the community does not currently exist, consider engaging people in the relevant social or personal network of the knowledge sources you intend to tap.



	<p>3. <u>Have a clear notion of what the captured knowledge is really about.</u> What is the scope? Knowledge that is packaged and published needs to cover a specific area of business activity or subject/domain —boundaries can provide focus.</p> <p>4. <u>Collate any existing material</u> upon which you can base your captured knowledge and look for general guidelines. Provide some context so that people can understand the purpose and relevance of the knowledge. Are there general guidelines that you can distil out of this material?</p> <p>5. <u>Elicit knowledge</u> from individuals, teams and groups with relevant experience. This can be accomplished through retrospective interviews of individuals, or formal learning processes and meetings (Action Reviews, Retrospect, etc) designed to glean and capture lessons learned, best practices etc, from recent projects or activities or events.</p> <p>6. <u>Distil the knowledge</u> into concise and highly relevant ‘nuggets’ that represent the key insights, lessons learned and practices of the knowledge sources. If multiple sources of knowledge are harvested, identify common and contending knowledge and highlight these accordingly.</p> <p>7. <u>Organize and package the knowledge with the customer in mind:</u></p> <ul style="list-style-type: none">• Build a checklist or guidelines illustrated with examples and stories. These should inform the user of the knowledge:• “What are the questions I need to ask myself?”• “What are the steps that I need to take?”• Illustrate it with examples, stories, pictures, models, quotations, video and audio clips if possible.• Develop a process map or workflow of the knowledge, and link the specific nuggets of knowledge with the relevant process sub-processes, activities and input and output elements.• Develop a set of questions from the knowledge and organize the distilled ‘nuggets’ around these. Design these questions to reflect the knowledge content that has been gleaned from the sources and to prompt the thinking of others.• Include links to people. Create a hyperlink to the knowledge sources personal home page or e-mail address wherever you mention them in the text. Include a list of all the people with any relationship with the content and/or a link to the relevant community of practice or other relevant networks. <p>8. <u>Validate the Guidelines.</u> Circulate the guidelines around the relevant community of practitioners and knowledge sources such as those interviewed. Ask them the following questions: ‘Do the guidelines accurately reflect your knowledge and experience?’ ‘What do you have to add?’</p> <p>9. <u>Publish the knowledge.</u> Store and manage the knowledge in a space where it can be easily searched, found and accessed by its community or other potential users. Often this will be the company intranet in the form of a digital knowledge asset as described here. New social media are also now available that make it easy to publish without having to master the programming or systems required to produce content on the Web to store the content include Wikis, Blogs, and Content Management Systems.</p> <p>10. <u>Initiate a feedback and ownership process.</u> Encourage feedback from users, so that they pick up and eliminate any invalid recommendations. Instill a sense of obligation that “if you use it, then you should add to it”.</p>
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Limits for SMEs	<p>The following barriers and problems in the implementation of knowledge capture have been observed across many organisations:</p> <ul style="list-style-type: none">• <u>Trying to capture too much</u> - Knowledge capture efforts should focus on what customers for that knowledge need, and not attempt to capture everything that is known about a particular topic. The basics of how to do something or foundational knowledge are probably already documented somewhere in a manual, guide, etc. Emphasis should be on what is not widely known, new learning, and other knowledge that is not typically documented in the usual manner.• <u>Underestimating the time and effort</u> - It is a laborious process to harvest knowledge and present it in a manner that people can make sense of it for re-use and adoption. For example, it may take eight hours to distil a handful of powerful knowledge nuggets or insights from a one hour interview with an expert.• <u>Capturing knowledge that is not used</u> - unless you have identified what the potential customers for the captured knowledge are interested in, there is a good chance it is not what others will find useful.• <u>Assuming one size fits all</u> - when it comes to methods for presenting captured knowledge it is important to understand people's preferences as receivers of knowledge. Some people find reading text a useful way to learn something. Others learn more by listening to an audio version of the knowledge shared by someone or by viewing a video of someone speaking or performing an activity.
Examples and experiences	<p>This method is used unconsciously since humankind recreates and transmits knowledge. For example, it is used, intentionally or not, when textbooks are written.</p> <p>Capgemini recommendation</p>



	MENTORING
Description	<p>Process of helping the employee to do his/her job more effectively in different stages of his/her development and career in a company and advancement of managerial skills by using the experience of employees with higher competences and position in the organisation's hierarchy.</p> <p>The basic aim of mentoring is to advance the process of adaptation and development of a company's employees by helping them to understand the culture of the organisation, its rules, its ways of making decisions and its standard methods of problems solving. Those aims are reached by individual training.</p> <p>The training is conducted by a mentor for another person – the mentee.</p> <p>Successful mentoring has to comply with several conditions:</p> <ul style="list-style-type: none"> • The mentor should be a successful person —in a position of authority and an example to follow in his/her work. • The mentee should feel safe with his/her mentor. • The mentor should have full internal agreement to share his/her experience, knowledge, etc. • The mentee who follows the mentor's steps should be strongly motivated to learn how to use the experience and knowledge in his/her career development.
Expected benefits	<ul style="list-style-type: none"> • Raising employee qualifications • Advancing and developing managerial skills • Faster adaptation and development of new employees • Helping in career development • Identifying unused skills and qualifications • Better matching employees to tasks • Improved internal communication • Objective evaluation of employees' competences • Increased employee identification with company
Context of use	Companies and organisations motivated by the concern that retiring employees will mean huge losses of irreplaceable intellectual capital.
Methodology	<p>The mentoring process consists of five stages or phases:</p> <ol style="list-style-type: none"> 1. Preparatory stage 2. The first meeting 3. Planning of joint activity 4. Dialogue 5. Monitoring of the mentoring activity and the end of mentoring. <p>The planning phase consists of two parts: the mentor self-analysis and collecting information about the mentee, his/her expectations, previous experience, etc. During the meeting phase the mentor and the mentee clarify their aims and try to establish cooperation relationships. The aim of the planning phase is to set objectives, timetable, etc. Dialogue as a separate phase is used to monitor the mentoring process and to make the necessary changes, corrections, if needed. The mentoring activity ends gradually, when the mentor sees that the set aims and objectives have been achieved and a mentee can continue his/her activity individually.</p>



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	<p>The mentor can use different approaches, such as: coaching, training, discussion, counselling, etc.</p> <p>Regardless of the form of the relation between mentor and mentee, the most important thing is that it should allow for active use of company experience and adapt the level of difficulty to the level of development of a given employee. Experience is not always easy to share and only long, direct contact allows for sharing of this knowledge in a usable way. In companies that put mentoring into practice there is a rule that a new employee, regardless of his/her position, is under the care of a person who introduces him/her to the company. The mentor participates in all of the mentee's tasks—especially in contacts with clients or with consulting problems, plans, etc. As practice shows, quality of support and type of bond created at that time between a new employee and the company, has a crucial influence on the career of that person in a given firm.</p> <p>With time, the new employee becomes more and more independent, but he/she still asks for advice, experience and knowledge of the mentor. If a mentee sees that his/her mentor is successful and has a possibility to observe how to reach a success, the mentee is very close to make every effort to reach similar results.</p>
Limits for SMEs	<p>The mentoring will not be successful in a company where there is:</p> <ul style="list-style-type: none"> • A lack of care for employees, high turnover of staff • A lack of stable policy in designing career paths • Very formal relations between employees • The senior manager, who mentors multiple younger employees, does not learn how to use digital tools and he based the teaching only through formal monthly meeting
Examples and experiences	<p><u>Black & Veatch</u>: Perry and several other senior leaders and key technical employees at Black & Veatch entered a phased-retirement program designed to reduce their workload, give them some time to reinvest their knowledge in the company, and provide them with some free time to begin adjusting to retired life. Some days, Perry's knowledge-transmission activities involve updating an 80-page training manual to include changes that have been made in recent years. But much of his time goes into what he calls 'informal mentoring' of around 30 to 40 employees who will need to know some his more intangible skills once he's gone—like negotiating with a hard-bargaining Brazilian. "I have never been creative enough to figure out how to write that stuff down," says Perry.</p> <p><u>American Express</u>: Another option is to focus on specific business units within the company. That is what American Express has done, focusing its efforts on senior employees in their technology units. In this case, this has been the preferred option because the transmission of technical knowledge is easier to address.</p> <p><u>Procter & Gamble</u>: Procter & Gamble has focused on what they called "connectors", that means, senior technical employees with more relationships and influence within the organisation.</p>



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	MULTIMEDIA TRANSMISSION
Description	The knowledge is transferred to a multimedia format, omitting the participation of the person who transmits the knowledge once the transmitter has downloaded his knowledge in a multimedia environment. (Video – Audio - Multimedia). This information can be shared and learned in a flexible way by a wide range of people.
Expected benefits	<ul style="list-style-type: none"> • Time savings - once the information is gathered in the multimedia format. • The information is always available for everyone, even if the person who has transmitted the knowledge is not in the company. • The knowledge can be gathered and classified. • The information can be accessed as often as needed. • The knowledge always remains in the company.
Context of use	Companies and organisations motivated by the concern that knowledge is an important treasure of the organisation and cannot be lost.
Methodology	<p>Once the information is gathered in a multimedia format, the person who wants to acquire the knowledge (new at work) just has to take the multimedia format and have a look in the office or at home, or with a group of people in the same situation.</p> <p>This methodology can be used in parallel with other complementary methodologies of knowledge transmission.</p>
Limits for SMEs	<ul style="list-style-type: none"> • Problems in recording, in terms of experienced employee rejection or privacy. • Not all of the learner's questions can be answered by the person who transmit. • If you change the procedure, it invalidates the recorded knowledge.



	ONE POINT LESSON
Description	<p>The one point lesson is a permanent training technique. It is both a method and a tool.</p> <p>It is one of the components used in improving know-how within the Total Productive Maintenance (TPM) quality approach of the industrial sector, developed and adopted in Japan in 1971.</p> <p>The one point lesson deals with a single point. It consists of formally setting down in writing the solution to a problem resulting in a production or maintenance incident with new knowledge or specific improvements. It is carried out by an expert employee.</p> <p>It is mainly used in industrial settings in large companies, in production and in maintenance within their quality approach. It can be easily adapted to small and medium-sized companies.</p> <p>The one point lesson is set on a page with a standard format.</p>
Expected benefits	<p>Immediate transmission of skills between an expert and one or several new entrants by examining an incident and formalising the solution to the problem. Transmission of knowledge on a particular point among employees.</p> <p><u>For the employee that is directly affected:</u></p> <ul style="list-style-type: none"> • Looking at the incident from a distance • Understanding the errors made • Acquiring knowledge and skills • Better control of working situations <p><u>For all employees:</u></p> <ul style="list-style-type: none"> • Fast acquisition of knowledge and operational skills • Permanent self-training • Better incident control • Capacity of initiative, anticipation <p><u>For the company:</u></p> <ul style="list-style-type: none"> • Improvement continues in employee training • Consolidation and development of employee operational skills • Capitalisation of knowledge and skills and dissemination among affected employees • Better management and incident reduction • Defining and sharing best practices • Training time and cost savings • Improved performance
Context of use	<p>There are several kinds of one point lessons, dealing with problem solving, improvements and knowledge development on a particular point.</p>



	<p>This method is widely used in industrial settings but can be easily adapted to other business sectors.</p>
Methodology	<p>The one point lesson can be developed in different ways.</p> <p><u>Development stage of the one point lesson:</u> This results from exchanges between employees and experts to formalise the one point lesson. The contents of the lesson are developed, written and illustrated with maps and or photos by the concerned actors on a page.</p> <p>Case practice: further to an incident, an expert helps the employee who was confronted with the incident in solving the problem and the formalising the one point lesson to be disseminated. It is a moment of transmission of knowledge and operational skills connected to the context of the incident.</p> <p><u>Usage stage of the one point lesson:</u> It generally lasts about 5 to 10 minutes. One point lessons are capitalised and placed at the disposal of the employees in hardcopy and/or digital form and made available for consultation, so they can be used by employees for self-training.</p> <p>The one point lessons can also be “led” during meetings or exchanges of practices, which is desirable for a dynamic transmission of knowledge and operational skills.</p>
Limits for SMEs	<p>Middle management has to use employee mistakes to transform them into learning opportunities rather than reprimands.</p> <p>The way one point lessons are disseminated is very important. Depending on the way, dissemination and adoption by employees will be effective or not. It is advisable to measure the quality of dissemination and of the transmission of knowledge and skills.</p>
Examples and experiences	<p>The one point lesson is used in industrial settings in Japan —particularly at TOYOTA but also at other large firms that have a quality approach.</p> <p>It is used in France in particular in ARCELORMITTAL, as constituent of the TPM quality approach. In the factory of Fos sur Mer, it is extensively used as a tool rather than a method.</p>



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	PEER ASSIST
Description	<p>Peer Assist is another knowledge technique used to facilitate knowledge exchange or transmit. Peer Assist is a facilitated meeting or workshop where peers from different teams share their experiences, insights, and knowledge with a person/team that has requested assistance in meeting an upcoming challenge or problem.</p> <p>For a Peer Assist meeting, a project team invites colleagues to assist them with a significant issue the team is facing. The request is initiated by the project leader when he/she thinks peers could be of help to the team. Usually 4-5 colleagues from other sites meet at the site of the requesting team. An assist may last from ½ a day to 2 days, during which the requesting team and those who have come to be assisters, are in dialogue about the project. The requesting team gains the insight of colleagues. The assisters benefit as well, learning both from the project and from each other. Teams who call for an assist are not required to use the suggestions that others make, although most find the insights of their peers of considerable value to their ongoing work. Some Peer Assists are called early in a project and some are called later, depending on the needs of the team.</p>
Expected benefits	<p>Peer Assist brings insight, assistance and knowledge from people outside of the organisation because peers will bring their own knowledge.</p> <ul style="list-style-type: none"> • It includes “outside” perspectives that bring new possibilities, options and ideas because the team • shares what it knows in the context of their own plan, and then peers share what they know • from their own context, drawing upon their own experiences, best practices and lessons learned. • It develops a “what we both know” expertise about a project or task requirement that is factored against • “what is possible” (based on the peer’s own previous success). <p>It promotes sharing of learning and develops strong and often new connections and networking within the overall organisation.</p>
Context of use	<p>Employees are more inclined to use knowledge and insights from other peers before they undertake a project or task. The key to a successful Peer Assist is to plan to begin after the team has exhausted their own internal knowledge and have created their plan, but before beginning any actual implementation.</p> <p>Individuals/teams who call for a Peer Assist are not required to use the suggestions that others make, although most find the insights of their peers of considerable value for their ongoing work. It is important to invite assisters who are ‘good colleagues’, not people who are overly critical or who dominate any discussion.</p>
Methodology	<p>The requesting individual/team gains the insight of colleagues and the assisters are learning both from the project and from each other. A peer assist can typically consist of 4-6 individuals, and the time to complete an assist can</p>



	<p>be as short as a few hours to as long as a couple of days.</p> <p>Whether to use a facilitator depends on how skilful the asking person/team is in managing his/their own behaviour. With a facilitator present the asking party will probably better be able to concentrate on the discussion.</p> <p>This is your team's meeting. You call it when and if you want, ask who you think would be helpful, set the objectives you would find useful, and make your own decisions about what to accept out of the advice you get. You manage the meeting to get what you want.</p> <ul style="list-style-type: none">• Be clear about the objectives you want the peer assisters to address. Your team may want to meet ahead of time to think through what would be of most useful to them. The more specific you are, the more effective the meeting will be.• Send the objectives to the assisters ahead of time as well as a limited amount of background material for them to read.• Stop part way through the meeting to identify what is and is not being helpful to you. It is your meeting. If you are not getting what you want you need to redirect what is happening.• Think of this as a working session, not a presentation session.• Have your whole team at the meeting (or representatives of each area if the team is large) so they can learn and ask questions.• Give the assisters some time on their own. You will get better recommendations if the assisters can talk freely among themselves without your team being present.• Consider the meeting as a discussion among your team members and the assisters. These suggestions may facilitate a discussion format:• Ask the leader to refrain from responding after every, or most comments. This limits the discussion to a serial exchange between the leader and individual assisters.• When an assister has made a suggestion, ask "Who has a different perspective on this issue?" or "I'm interested in hearing the thoughts of others about this issue."• Intersperse members of the requesting team around the table with assisters.• Arrange the room so the focal point is not the leader – the leader may want to start the meeting in the front of the room, but later sit at another place at the conference table in order to visually demonstrate that he/she is not the focus of the discussion. <p>It is critical for the team to come back together a few days later to review what they learned from the Peer Assist and what they will now do based on it. Without this sense making meeting, much of the energy generated in the meeting will disappear. A meeting can look as follows:</p> <ul style="list-style-type: none">• Introductions: it helps the discussion if participants know about the experience and knowledge of others in the room. Even if only one or two participants do not know each other well, spending time on introductions will assist the group.• Objectives: as project leader state your objectives for the meeting and how you have framed the time schedule.• Presentation and discussion: present any information you have that
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	<p>was not in the pre-documents - concerns and issues that are critical to you. It is often helpful to have different team members present the areas they have been working on. The word “present” is not intended to imply a formal PowerPoint presentation, but rather providing enough information to initiate the dialogue on a particular topic.</p> <ul style="list-style-type: none">• Time for the assisters to work on their own: Once all the issues and data are on the table, the requesting team needs to leave the assisters to themselves to think through their recommendations. There may be a strong pull by either the requesting team or the assisters to stay together – groups rarely choose to separate. But time for the assisters to think together is very critical to, 1) getting well stated and agreed upon recommendations, and 2) enhance the assisters’ own learning.• Providing recommendations: The two teams come back together so that the assisters can offer their recommendations.• Response to assisters: The requesting team makes a response of appreciation and perhaps nothing what they found particularly helpful. This is not a decision time – the requesting team makes its decisions at their own meeting at a later time.
Limits for SMEs	This method is applicable in case of transmission of “new” knowledge. It has not initially been developed for SMEs, but when there is creative staff present in the company it surely is possible,
Examples and experiences	Peer Assist at British Petroleum



	SELF-CONFRONTATION INTERVIEW
Description	<p>The self-confrontation interview is the confrontation after the fact of an employee in one of his/her recorded working activities (video, sound). The ethnologist J. Theureau originated this concept which allows for the identification of the real work of the employee (or at least a part), particularly what they do without being aware of it. The psychologist Y. Clot speaks about revealing the “details of the job.” But this is not the only goal of this method, it is also a question of producing a new experience for the employee who inevitably has to change his/her stance and discover by distancing himself/herself from the job.</p> <p>It requires a prior interview with the employee to get a global understanding of his/her activity, and observe and film the employee in action.</p> <p>A mediating participant —a consultant who practices this method— asks the employee what he/she does and why. The employee is asked to specify the meaning of gestures, attitudes, movements and the environment (sounds).</p>
Expected benefits	<p>The self-confrontation interview allows one to identify implicit skills and knowledge of the job which become explicit through this exercise for both the employee in question and for the others and can then be transmitted. It is also necessary to capitalise data so that it can be shared.</p> <p><u>For employees:</u></p> <ul style="list-style-type: none"> • Through this exercise in which employees examine what they are doing and become aware of what they sometimes do without realising that they are doing it. The employee can then conceptualise his/her logic of action. • They acquire new skills and know-how enabling them to analyse their own activities to then be able to strengthen them and make them more efficient. Having understood his/her logic of action, the employee will be able to re-configure his/her knowledge and skills in other situations. • Employees will be able to explain the way they do things to one another and explain what motivates their choices of action, thus pass their knowledge on. <p><u>For companies:</u></p> <ul style="list-style-type: none"> • Capitalising knowledge and skills and what up to now where implicit skills and consolidating their knowledge to see development of these knowledge and know-how, sharing. • More competent employees. • Employees that are able to progress because they know how to explain how and why they do things to achieve expected results. • The video of the activity of the employee can constitute a training tool.
Context of use	<p>The self-confrontation interview is used in analysing working situations that are considered critical or sensitive by the company in terms of skills.</p>
Methodology	<p>The consultant will have viewed the filmed session to look for salient aspects supporting his/her notes taken during the interview and while observing the</p>



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	<p>subject at work. He/she will attempt to analyse the complete working sequence with the employees so they can validate the indicators which they use as a basis for their actions. The role of the consultant is crucial in bringing the real work, knowledge and skills of each employee to the forefront.</p> <p>The employee sees himself/herself for the first time in action and is invited to explain each of these actions. Through a game of questions and answers between the employee and the consultant, a fine analysis of the action of the employee is outlined. This brings out implicit skills and knowledge; the particular traits of the actions.</p> <p>The conditions of the self-confrontation interview are also important. A quiet room should be made available and they should not be disturbed for 1 to 2 hours. The consultant must be competent in this type of method.</p> <p>The video tool allows the employee to view the working sequence as often as needed to glean out new details and ask questions for better understanding.</p>
Limits for SMEs	<ul style="list-style-type: none"> • A consultant is necessary to analyse the working situations. • There needs to be an agreement to film the employee. • Enough time should be made available for the employees to go through the self-confrontation interview. • There should be a quiet room available for the interview.
Examples and experiences	<p>The self-confrontation interview is used in France by researchers and job analysis practitioners.</p>



	STORYTELLING
Description	<p>“Back in the mists of time when only the monks and the monarchy could write, there were three ways in which we learnt: first by having a go at it. When that didn’t work, or you wanted to improve - by watching someone who knew how to do it. Then at the end of the day when the sun had set and it got too dark to see what anyone was doing - by listening to that ‘someone’ tell you about the time when they...” (Weaver - Grazing Animals Project, 2003).</p> <p>Storytelling, for business, is one of the most underused, yet effective tools. If you begin to change how you communicate your company’s needs and ideas to your employees, you will quickly see just how powerful you can be as an effective storyteller. Just as your favourite books, movies, and television shows grab your attention and communicate their message to you, you can do the same within your own organisation.</p>
Expected benefits	<ul style="list-style-type: none"> • Stories allow people to convey tacit knowledge that might otherwise be difficult to articulate. • Storytelling is very helpful in cross-cultural situations. • Stories are memorable, their messages tend to “stick”; oral storytelling has a greater impact than putting them into booklets, on video or online. <p>In storytelling the transmission of knowledge goes:</p> <ul style="list-style-type: none"> • quickly: Storytelling communicates ideas holistically. As a result, listeners can get complicated ideas not laboriously, dimension by dimension, but all at once with a new gestalt, which is transmitted with a snap. • naturally: Storytelling is our native language which we know how to do at the age of two. Abstract language by contrast is something that we learn at the age of eight or later and becomes a kind of foreign language that we rarely feel as comfortable in as our native language, storytelling. • clearly: By drawing on this natural age-old method of communication, storytelling helps us make sense of a chaotic world by connecting us with time and space and human purpose of a sequence of events so as to make sense. • truthfully: Stories can communicate deep holistic truths, while abstract language tends to slice off fragments. • collaboratively: In abstract discussions, ideas come at us like missiles, invading our space and directing us to adopt a mental framework established by another being, and our options boil down to accepting or rejecting it, with all the baggage of yes-no winner-loser confrontations. Narrative by contrast comes at us collaboratively inviting us gently to follow the story arm-in-arm with the listener. It is more like a dance than a battle. • persuasively: When the listener follows a story, there is the possibility of getting the listener to invent a parallel story in the listener’s own environment. Since we all love our own babies, the story so co-created becomes our own, and something we love and are prepared to fight for. • accurately: Before the advent of instant global communications, there was less awareness of the context in which knowledge arises. When communications were among people from the same village, or district, or city, one could often assume that the context was the same. With global communications, the assumption of similar context becomes



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	<p>obviously and frequently just plain wrong. Storytelling provides the context in which knowledge arises, and hence becomes the normal vehicle for accurate knowledge transmission.</p> <ul style="list-style-type: none"> • intuitively: We know more than we realise. The role of tacit knowledge has become a major preoccupation because it is often the tacit knowledge that is most valuable. Yet if we do not know it, how can we communicate it? Storytelling provides an answer since by telling a story with feeling, we are able to communicate more than we explicitly know. Our body takes over and does it for us, without consciousness. Thus although we know more than we can tell, we can, through storytelling, tell more than we (explicitly) know. • entertainingly: Abstract communications are dull and dry because they are not populated with people but with things. As living beings we are attracted to what is living, and repelled by inert things such as concepts. Stories enliven and entertain. • movingly so as to get action: Storytelling does not just close the knowing-doing gap. It eliminates the gap by stimulating the listener to co-create the idea. In the process of co-creation, the listener starts the process of implementation in such a way that there is no gap. • feelingly: For all the talk about emotional intelligence, explicit talk about feelings can be cloying. Storytelling enables discussion of emotions in culturally acceptable and elegant way. • interactively: Unlike abstract talk, storytelling is inherently interactive. The storyteller sparks the story that the listeners co-create in their own minds.
Context of use	<p>Storytelling does not replace analytical thinking. It supports it by giving it context and meaning.</p> <p>Abstract analysis is often easier to understand when seen through the lens of a well-chosen example in the form of a story.</p> <p>You can use storytelling to help communicate your own vision for the company. When employees hear about the dream that you have for making the business successful, told eloquently through an elaborate tale, they will begin to create a mental image of exactly what their role can be in that plan. With a solid connection to the future of the company, they will have a greater desire to be a part of the end result.</p> <p>A solid story can give people a good reason for doing their job each day. Relay for them the results of their actions through an imaginary or real life example about how their job affects your customers. Having an idea of what kind of influence their dedication and actions might have on the outside world can often give employees the extra push that they need to go above and beyond in their profession.</p>
Methodology	<p>Storytelling is the use of stories in organisations as a communications tool to share knowledge.</p> <p>One employee tells the other how to do a certain task; often this will be accompanied by showing it.</p> <p>This has always existed in organisations. Its use as a deliberate tool for</p>



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	sharing knowledge is quite recent.
Limits for SMEs	There are no limits, especially in this sector a lot of knowledge is transmitted orally from the experienced employee to the newcomer.



EXAMPLE MENTORING: American Express

A pilot program at American Express gives soon-to-be retirees less work and more time to pass along their expertise to younger generations

With baby boomers poised to leave the workforce, will the next generation of workers be equipped to run the show?

That question was on the minds of executives at American Express in 2006, when the company assembled an internal team to anticipate problems and pose solutions stemming from demographic shifts in its workforce.

Before long, the group made an important discovery: Not only would a huge number of employees become eligible for retirement in the next five to 10 years, the company had done little to retain the wealth of institutional knowledge they would be taking with them. From the intricacies of key client relationships to mainframe computer languages no longer being taught in school, many experienced workers possessed critical know-how that, if lost, would be costly—if not impossible—for the company to replace.

This was a problem with no simple solution, according to Jim Rottman, head of American Express' workforce transformation group. Retiring employees would need incentives for infusing the company with their knowledge, and they would need time to do it. Their expertise would have to be translated and presented in a form that would appeal to the younger workers receiving it. And since it would be nearly impossible to elicit knowledge from all exiting employees, the company would have to target those with the most crucial skills.

Pilot Program Launched in 2008

These parameters helped shape the American Express phased-retirement program, a pilot initiative launched during the first quarter of 2008. Rather than retiring and leaving the company at once, participants gradually give up their day-to-day responsibilities, while replacing some of their free time with activities like mentoring and teaching master classes to their successors. In addition, they get more time out of the office doing whatever they want—be it planning for life in retirement or doing charity work. The phased retiree continues to receive a portion of his previous salary, benefits as usual, and the company in turn gets to hold on to some of its most valuable employees a year or more past traditional retirement age.

For now, the program is only being rolled out to employees in two of its business units: technology, because it was easiest to assess what skills needed to be passed on there, and finance, because that's where the company has some of its most important client relationships. Soon-to-be-retirees in these units can apply to be part of the program.

It's an easy sell to senior employees, says Rottman. "It allows them to pursue their personal passion while working at American Express," he says. "And it allows them to leave their legacy behind and get the next generation of leaders and experts ready." It also helps them avoid some of the emotional and financial hurdles of sudden retirement.

EXAMPLE MENTORING: Black & Veatch's

Each night during a recent sales trip to Rio de Janeiro, Senior Vice-President Michael Perry would review the day's progress over dinner with several junior staffers accompanying him. After watching Perry in action, they had plenty of questions: Why had he worked toward a compromise when the Brazilian client clearly wasn't going to budge? How was he accounting for



the different cultural perspectives of the British, Japanese, and South Korean businessmen who were potential partners in the deal?

Perry and colleagues returned to Black & Veatch's Kansas City (Mo.) headquarters with strong progress to report on the \$1 billion energy project. But the 59-year-old executive had done something that will probably prove even more valuable for the company in coming years, after his retirement: He instilled some of his specialized negotiating skills in his would-be successors.

The knowledge management like this are becoming more common at companies, motivated by the concern that droves of retiring baby boomers will mean huge losses in irreplaceable intellectual capital. "When people leave organizations today, they are potentially taking with them knowledge that's critical to the future of the business," says David DeLong, a business consultant and author of *Lost Knowledge: Confronting the Threat of an Aging Workforce*. Whether it's a key client relationship, mastery of an outdated computer language, or simply knowledge about where certain files are saved on a company server, every business has stored up bits of information and know-how that isn't written in a manual or recorded in a training video.

Intangible Info

Many companies are rolling out initiatives aimed at capturing mission-critical knowledge before it walks out the door, and making it stick with younger generations of workers.

At the start of this year, Perry and several other senior leaders and key technical workers at Black & Veatch entered a phased-retirement program designed to reduce their workload, give them some time to reinvest their knowledge in the company, and give them some free time to begin adjusting to retired life. Some days, Perry's knowledge-transmission activities involve updating an 80-page training manual to include changes that have been made in recent years. But much of his time goes into what he calls "informal mentoring" of around 30 to 40 employees who will need to know some his more intangible skills once he's gone—like negotiating with a hard-bargaining Brazilian. "I have never been creative enough to figure out how to write that stuff down," says Perry.

Some of the inspiration for the Black & Veatch initiative came last year, when HR leaders from the company participated in a research working group on "multigenerational knowledge transmission," organized by management researcher the Conference Board. Meeting periodically over a nine-month period, representatives from Black & Veatch, American Express, Procter & Gamble, and six other companies compared notes on the best ways to facilitate a knowledge handoff from one generation of workers to the next.

EXAMPLE JOB ROTATION: Glen Royal

Glen Royal is a small manufacturing company specialising in high quality small leather goods. In November 2008 the company had just been taken over and it employed 12 people. Two of the former shop floor workers have been selected and promoted to Production Manager and Production Supervisor respectively and given the remit of turning round the company.

Using their highest quality Scottish branding, the company has secured a healthy export market in Japan and this market is rapidly expanding. A successful marketing campaign by the Production Manager has also opened up new home markets, mainly targeting the high spend tourists at Turnberry and other Golfing Hotels.

This increase in demand has allowed Glen Royal to increase their shop floor staffing and in partnership with WEA Ayrshire Job Rotation the company now has created 6 additional posts. These extra posts have allowed the company to increase production and release staff to participate in training.



The company wanted to offer bespoke quality products to customers i.e. an individual design service. However, this required staff to undertake training in design and pattern making. A trainer was sourced who could provide a training course tailored exactly to the needs of the company and their costs were part funded by the Job Rotation Project.

A Job Rotation Trainee (JRT) was employed by the company to allow staff to be released for training. The JRT was trained to a level which allowed other existing staff to be released for the specialist training and the Job Rotation model also allowed the JRT to participate in the specialist training thus securing her future employment within the company as it continues to grow and expand.

By participating in Job Rotation the company hoped that they would achieve the following:

- Confidence in talking to external customers
- Broad based knowledge of computers and administration systems
- Expansion of company confidence and abilities.

9 months after starting with Job Rotation the company reported to have achieved all of its targets and more.

EXAMPLE JOB ROTATION: Newmilns Snow & Sports Complex (NSASC)

Newmilns Snow & Sports Complex, (NSASC), a Not for Profit organisation, has worked with Job Rotation in providing suitable needed training and learning opportunities for their staff.

All Job Rotation trainees (JRTs) are recruited from unemployed residents of the East Ayrshire areas. SMEs are encouraged to recruit new employees through Job Rotation by provision of a wage subsidy for the period of their placement and flexible budget for identified training.

NSASC was initially run by the local council, it was taken over by a local committee in 2004 and changed to a Social economy company and is a not for profit organisation. It had only one employee trained as a dry slope ski instructor at the beginning of 2005 and a few untrained volunteers. They had a large amount of clients but they did not have enough trained staff to accommodate the numbers. They initially needed another trained member of staff, which they were successful in getting a month later. The manager said that they found it very difficult to get a day off for the first few months as they were trying to cope with all the work. This resulted in low morale amongst the team.

Social Inclusion, was not being able to take a large group of kids or adults with disabilities, even after being approached by local schools and schools with special needs but none of the staff were fully qualified.

They needed to encourage more customers, especially for the summer months as lack of customers/revenue resulted in poor quality equipment and they needed to offer more outdoor pursuits other than just dry ski instruction, they also needed more qualified trained staff, and needed to increase their takings to £1000 per week to allow them to buy new equipment as they had a number of people very interested in learning how to snowboard (mainly children), but they didn't have equipment that would be suitable for them to use and they needed to reach local schools and offer daily events.

Their goals at this stage were:-

- To increase the number of *qualified* staff/volunteers from 1 member to 4.
- To increase the client base of 566 to 700 by the end of the year.
- To expand the overall range of activities especially to make provision for children and adults with special needs.
- To be able to purchase new equipment that would allow young children to access the activities.



Job Rotation helped with the recruitment of Job Rotation Trainee (JRT) who was taken on to train as an instructor. He was a Ski Leader, (some one who can guide people around a mountain) he also had a first aid certificate and had been on a technical ski course. Job Rotation trained the JRT to instructor level very quickly and this allowed the Ski Slope to concentrate on their volunteers for instructor training.

Job Rotation staff conducted a TNA for the ski slope and agreed the nominated Company Beneficiaries (CBs), some of which were volunteers originally. We found that although the CBs were very good at their chosen sport none of them had any formal training or instructor qualification, although a couple did have the Ski Leader award. They were pleasant towards customers but needed proper customer sales skills training which led to increased confidence when dealing with all members of the public.

The age range of the CBs was from 16-64, both male and female, and most of them were all local residents.

At the beginning there was no provision for learning and no structure for training courses.

On appointment of a Job Rotation trainee, staff from Job Rotation and Newmilns Snow & Sports Complex carried out an organisational training needs analysis and review and recorded the strategic objectives of the company. Throughout the duration of the programme Job Rotation staff carried out training and development reviews with appointed manager/mentor in the company.

Team discussions and the use of Job Rotation training needs analysis highlighted the training needs of their employees and their determination to be successful.

A variety of courses were discussed to help increase turnover and to capture the local youth within the community. The courses were taken by 7 employees over 12 months and they were:

- Mountain Boarding Instructors
- Snow Boarding Instructors
- Advanced Ski Instruction
- Dry Ski Instructors
- First Aid
- First Aid Trainers Course
- Basic Sign Language
- Mentoring

To improve performance client feedback was given to the team via team meetings.

Courses such as mentoring, customer care, H&S at work, employment law were also taken to improve strong team ethics.

"We have found that the percentage of booking a second lesson has increased in private lessons. Also an increase of children enrolling in our 'school holiday' ski schools, as well as the number of hits on our web site. All this evidence leads me to believe that our staff is performing very well and that the courses and trainings that have been organised and funded by JR has increased their knowledge, understanding and productivity." Ski Slope Manager.

The newly trained instructors were able to analyse peoples performance, provide a good lesson plan and evaluate the client to enjoy their lesson and progress their activity. Clients would book further lessons and then they would recommend instructors to other people and all this information was passed on to the instructors to create a sense of ownership and pride.



EXAMPLE PEER ASSIST: British Petroleum

Helen is a team leader for British Petroleum's Barden Exploration site. She has four people reporting to her, two geo-physicists, a geologist, and a petroleum engineer. The team has spent several months collecting and analyzing a great deal of data about the possible well site off the coast of Norway known as Barden. The team is at a point where they need to make a decision as to how they will proceed.

Should they commit to a rig? Should they make firm commitments to their partners in the exploration license? These are important decisions because of the money involved; a rig, for example, can cost up to 200 dollars a minute!

Helen's team has decided it would be useful for her to call upon the knowledge that other people in BP have learned about this type of prospect. They are going to call a Peer Assist. That means identifying people from other parts of the world who have experience with the kind of issues facing the Barden team.

Helen identifies about 15 possible candidates; people she has worked with before or knows about through the grapevine. She makes the calls. She finds some are too busy on other projects, but she ends up with six people from her original list that she thinks can be very helpful, three from the Norway office, one from Scotland, one from South Africa and two from London. They have agreed to meet on Wednesday, one month from now, in Stavanger, Norway to spend the day.

On the meeting day, Helen starts by defining what her team wants from the peer assist. She lays out their objectives for the meeting. The peer assist members have received a packet of material to read through in advance. The walls of the conference room where Helen's team and the peer assisters are meeting are covered with pictures of the ocean bed, seismic lines, and charts. More are spread several layers deep on the tables around the room. As Helen finishes her introduction, the peer assist group asks some clarification questions about the objectives, and then Helen introduces Knut who begins to talk through the data and his interpretation of it. Before long everyone is up looking more closely at the wall data. There is a lively discussion about the implications among all the participants.

After a coffee break, Martin, another team member, is introduced and he begins to show the data for seismic velocity. Again within minutes the whole group is back on their feet examining the charts more closely. The discussion flows back and forth with the peer assist members asking each other technical questions about the data and often challenging each other's responses.

After the lunch break, Helen says that they have finished presenting the data they planned. The peer assist group again returns to questions about the original objectives for clarification in light of what they have just heard. One of peer assisters notes that: "I'm uncomfortable with the discussion because there are some strategic decisions to be made before we can give our opinion on whether to drill the well." The group decides they need to develop criteria for drilling the Barden well. Collaboratively the two groups develop these criteria, gaining additional insight as they talk through each point.

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