# How to Assess A Quality Knowledge Transfer Program

Before adopting a knowledge transfer solution, use the checklist below to assess what you truly need. Does your program have:

☑ **A clear risk profile for a ready workforce:** Do you need to focus your efforts? If so, can you easily spot where your workforce has gaps or red flags, such as retiring workers with unique knowledge or the need for rapid onboarding? Can you take a general approach or do you only have enough resources to focus on the riskiest areas?

☑ **Clear metrics and deliverables:** Will your budget sponsors or executives want you to provide regular updates on progress made and a clear ROI?

☑ **Role definition for the teacher/expert, learner, manager and executives:** When you ask a subject matter expert to be a mentor to others in your workforce, do they know how to judge their own success? How about the apprentices – do they know what their role is? Or the others involved just as executive sponsors?

☑ **Framework for setting priorities:** If the experts in your workforce are being asked to transfer their knowledge but are already very busy, would it help them to know where to focus in their efforts?

☑ **Date-driven plans for mitigating the risk:** Do you value operating from a plan that can be scheduled and implemented in small chunks of time, such as one hour? Do you want to be able to hold mentors, managers and apprentices accountable for results?

☑ **Easy-to-explain process with a common lexicon:** What does "knowledge transfer" mean in your organization? Do you need a common language for discussing the problem and the solution so that everyone can be on the same page and quickly get on board the solution?

☑ **Uncovers and transfers wisdom and tacit knowledge:** Do your experts have knowledge that would be hard to document that comes from years of on-the-job experience?

☑ **Supports international knowledge transfer:** Do you have employees or outsource partners outside North America? Does your knowledge transfer program accommodate the logistical challenges and cultural differences of working with off-shored teams?

☑ **Supports knowledge transfer between employees and outsource partners:** Do you need to manage information flow, training (and being trained) in working with your outsource vendors or partners?

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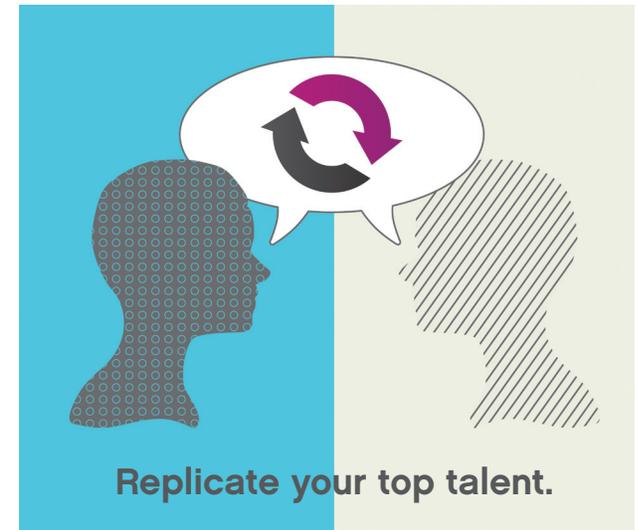
☑ **Works cross-platform:** Do you ever need to transfer knowledge between different areas of the business, such as between architects and developers or between engineering and manufacturing?

☑ **Customizable for individuals:** Do you want to be able to pinpoint and track knowledge transfer between one person and another—or is it okay to put tools out there for anyone to use with minimal direction?

☑ **Scalable:** Do you need this solution to work in the larger organization or just at an individual team level?

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Knowledge Transfer, Quick and Clear