

Knowledge Transfer Glossary

Term/Acronym	Definition
Air, Food, and Water	Loosely based on Maslow’s Hierarchy of Needs, the first information an apprentice needs is “air, food, and water.” These are the things you have to know to survive and be ready to learn more. If you are mentoring a new employee, providing “air, food, and water” may include getting connected to email and added to appropriate team aliases, invitation to the team meeting, where to find tools, jargon definitions and other relevant resources. If you’re a silo mentor, the list will be a subset of the new employee’s list—specific to your silo.
Apprentice	Someone who needs to know. An apprentice could be people new to your team, new to the technology, customers, vendors, interns, or even your manager.
Bench strength	Bench strength is a synonym for “backups.” If a team has “enough bench strength,” they would have enough skilled people to cover the work at hand, even if the primary person responsible for that work were to become unavailable.
Big Picture	The “Big Picture” provides the context of the job (or silo) so that an apprentice can focus, prioritize well and make good decisions daily. There are 8-10 questions that measurably demonstrate a team’s knowledge of the Big Picture. You will know when you “get the Big Picture” when you sound like your manager and other team members when you speak to customers or people with whom you collaborate.
Knowledge Silo Matrix	The KSM is the first step in the 3-step Knowledge Transfer Process. The KSM inventories the deep and narrow areas of expertise (“silos”) that exist within any working team, and inventories the skills of the employees who are working in those silos relative to their role as expert/mentors, independent workers and actively learning apprentices. It is a risk assessment tool that helps a team see where they may have skill gaps now or in the future, and then helps them make plans to reduce those skill gaps.
<i>KSM Color definitions:</i> <ul style="list-style-type: none"> ▪ <i>Purple</i> 	Purple on the KSM means that you are the standard bearer and the person we want to replicate relative to this particular silo of knowledge. This is not just the “best” person in this silo. Note that it is never a good idea to have <i>everyone</i> marked purple because we would not want everyone to be asked to set the standard. One reason very skilled employees would not be marked purple is because we want to prioritize, focus, and level their mentoring workload. By marking these people green instead of purple, we’re steering questions about this silo to other people.
<ul style="list-style-type: none"> ▪ <i>Green</i> 	We like to say that it is good to be green. A lot of green boxes on the KSM mean that a team has a stable, competent workforce. For you, it means that are <i>sufficiently</i> consistent with the standard set by the mentor(s). Green does not necessarily mean that you’re not capable of mentoring; it simply means you’re not tasked to mentor at this time.

<ul style="list-style-type: none"> ▪ <i>Yellow</i> 	<p>If you're marked yellow, you are currently pursuing the development of that skill set as a priority relative to your other work. Typically that means you already have or will soon get a Skill Development Plan (SDP), so you know exactly what you have to do to be marked green. There are two main reasons for being marked yellow. One reason is that you are new to the skill. Another is that you are <i>insufficiently</i> consistent with the standard set by the mentor(s) because, for example, the standard just became clear or has recently changed. You want to be thoughtful about how many silos any one individual can be actively learning at any one time and work with your manager to prioritize those on your list.</p>
<ul style="list-style-type: none"> ▪ <i>White</i> 	<p>White means not currently doing the work or learning the work.</p>
<ul style="list-style-type: none"> ▪ <i>Red</i> 	<p>Red means at risk! If the team doesn't have sufficient bench strength relative to the business need (3-18 months out), the silo may be at risk and marked red. Employees may be marked red if they have unique knowledge relative to business need or are marked purple in too many silos. It often means that their departure or inability to do their job would put the business at high risk.</p>
Knowledge Transfer Process Owner	An individual who is trained on the 3-step Knowledge Transfer Process so he/she can facilitate knowledge transfer on the team.
Knowledge Transfer Workshop	The KTW is the third step in the 3-step Knowledge Transfer Process. The 1- or 2-day workshop provides 15 proven tools and techniques that can be put to use the next day to help mentors transfer knowledge more effectively and efficiently and help apprentices take responsibility for their own learning.
KSM	See Knowledge Silo Matrix
KTPO	See Knowledge Transfer Process Owner
KTW	See Knowledge Transfer Workshop
Mentor	Someone who transfers knowledge and delivers on-the-job training.
Risk	<p>When risk relates to knowledge transfer, we assess if we have enough bench strength for the critical areas of expertise ("knowledge silos") to deliver on our strategy 12-36 months from now.</p> <p>Considerations to assess knowledge silo risk include:</p> <ul style="list-style-type: none"> • Importance to the business strategy • Current bench strength relative to need • Availability in the marketplace • Time it would take to train someone to take over • Likelihood of losing current expert <p>Considerations to assess employee risk include:</p> <ul style="list-style-type: none"> • Overload: too many silos in which he/she is a Subject Matter Expert or trying to learn too much at once and therefore unable to be a solid contributor in any knowledge silo for the team. • Imminent departure due to feeling overwhelmed as either a mentor or apprentice or eligible for retirement.
SDP	See Skill Development Plan

Silo	A silo of knowledge is an area of expertise within a job function. It is typically made up of 20-100 tasks or skills that must be known to work independently in that topic area. Most knowledge silos take a minimum of several weeks to learn and some could take up to a year or more. Silos typically include tools, processes, platforms, customers, physical locations, systems, and technologies that make up the work of the group.
Skill Development Plan	The SDP is the second step in the 3-step Knowledge Transfer Process. After the areas of expertise are identified in the Knowledge Silo Matrix (KSM), an SDP is created for each silo, prioritizing the highest risk silo first. The SDP provides a plan or roadmap for all the skills an apprentice needs to do their job. It provides a clear list of work they must be able to do, specific ways that they can “test” themselves to ensure they’re competent and resources that they can use to help them take responsibility for their own learning. The plan is prioritized by the correct sequence to learn the skills and dates they should be able to master them.