

# 3-step Knowledge Transfer Plan

## Knowledge Silo Matrix

STEP 1

## Skill Development Plan

STEP 2

The KSM assesses risk.

Name	Priority:	Silo					
		1	4	3	2	4	1
Employee 1		Insufficiently consistent	Sufficiently consistent	Sufficiently consistent	Sufficiently consistent	Sufficiently consistent	Insufficiently consistent
Employee 2		Insufficiently consistent	Risk	Risk	Risk	Risk	Risk
Employee 3		Insufficiently consistent	Sufficiently consistent	Sufficiently consistent	Not working in that silo	Sufficiently consistent	Risk
Employee 4		Insufficiently consistent	Sufficiently consistent	Insufficiently consistent	Insufficiently consistent	Not working in that silo	Insufficiently consistent
Employee 5		Insufficiently consistent	Not working in that silo	Not working in that silo	Not working in that silo	Sufficiently consistent	Not working in that silo
Employee 6		Sufficiently consistent	Risk	Not working in that silo	Not working in that silo	Risk	Risk
Employee 7		Insufficiently consistent	Sufficiently consistent	Sufficiently consistent	Sufficiently consistent	Sufficiently consistent	Risk
Employee 8		Insufficiently consistent					
Employee 9		Insufficiently consistent	Sufficiently consistent	Sufficiently consistent	Not working in that silo	Sufficiently consistent	Sufficiently consistent
Employee 10		Insufficiently consistent	Sufficiently consistent	Sufficiently consistent	Sufficiently consistent	Sufficiently consistent	Risk

- Chosen to mentor
- Sufficiently consistent
- Insufficiently consistent
- Not working in that silo
- Risk

- What are the knowledge domains or “silos” that need to be known?
- Who is the expert setting the standard for each silo?
- What bench strength do you have now?
- What is the risk you’ll have insufficient bench strength 1–3years from now?

The SDP creates a measurable path to reduce risk.

Skill	Sequence	Test Questions	Date	Resources
Write a...	1	1, 2, 3, 5	May 10	Specific documentation at location...
Design a...	2	1, 2, 3, 8	May 17	Formal training date
Build a relationship with...	3	3, 4, 7, 8, 14	May 19	Name of a mentor
Lead...meeting	4	1, 2, 9	May 25	Specific template
Troubleshoot...	5	2, 5, 7, 14, 20	May 28	Samples at this location...

## Knowledge Transfer Workshop

STEP 3

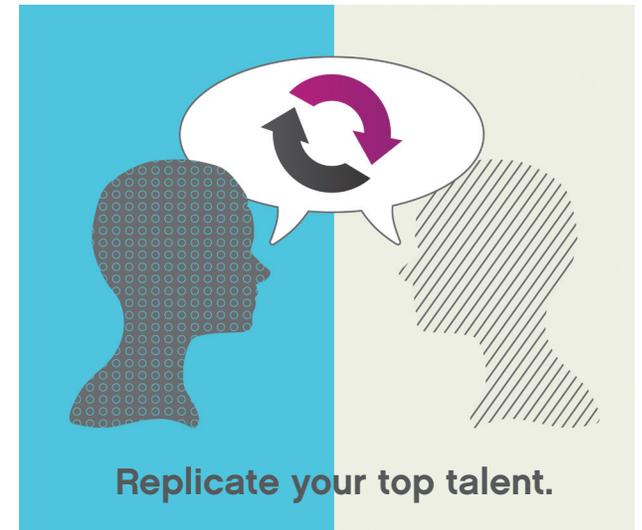
The KTW provides practical tools to support mentors, apprentices and managers.

- Define roles and clarify expectations
- Stay in touch while still getting your regular work done
- Clarify and cover “the basics” first
- Explain the “big picture”
- Write and be held accountable to a Skill Development Plan
- Teach across generational and learning style boundaries
- Test to ensure wisdom and tacit knowledge have been transferred
- Give feedback on the resulting work

# 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?



- ✓ **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?