AGILE LEARNING ORGANIZATION

Structured Knowledge Transfer
Worksphere Map©

B. Ackermann
CEO, Wissenstransfer GmbH

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Wissenstransfer GmbH

- **Agile, learning organization**
  Develop and efficiently benefit from the potential of your Organization
- **Concepts that work for your Vision and in daily business**
  Implement elements of an agile, learning organization in strategy and daily work
- **Skills management**
  Transparent expert-skills to find the right persons and speed up development, e.g. for projects
- **Succession management**
  Identify potential, plan and execute successful succession management
- **Awareness training, presentations, workshops**
  KM as a strategic topic for daily work, realize quick wins
- **Inhouse Coaching – make things happen**
  Structured knowledge transfers for key persons (experts, managers, projects, outsourcing)
- **Enabling your organization**
  Train the trainer – build up your internal knowledge transfer coaches
- **Guidance, support and boost during implementation**
  We offer templates, tools and other implementation support

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Customers

Federal / Cantonal Administration

- **Canton Aargau**, **(department of education, culture and sport)**
  Leadership development
- **KSA (cantonal hospital Aarau)**
  Human resource / personnel development
- **Insel group Bern (group of hospitals)**
  QM an knowledge management, software evaluation
- **BAKOM (federal department for communication)**
  Knowledge transfer for key persons, e.g. director / deputy, experts, teamleaders, team cooperation, Leadership development
- **BFS (federal department of statistics)**
  Skills management (taxonomy, processes, tools), employee skill profile present-future view, realize personnel development, employer branding
- **VBS/NDB (federal department of defense / intelligence service)**
  Optimize team collaboration, build up real deputies
- **BAG (federal bureau of health)**
  Succession management with waiting period / gap to succession, knowledge retention
- **ASTRA** (federal department of streets)
  Management awareness trainings, employer branding
- **EPA** (federal department of human resources)
  Management seminar knowledge transfer topics, KM concept support and guidance
- **EDA/DEZA** (federal department of external affairs)
  Efficient knowledge transfer in the context of development projects

Economy

- **DSM (global chemical industry)**
  Learning organization: increase team collaboration, increase employer branding, part time working, increase transparency on work areas, succession of key people
- **Generali (global assurance)**
  Train the trainer for internal transfer coaches, succession of key persons, WSM templates for internal use
- **HP (global IT, enterprise customers CH)**
  Burnout prevention for leaders with WSM, transparency and prioritization of topics
- **SBB (Swiss federal railway company)**
  Succession of key persons, optimize team collaboration
- **DBSchenker (global transportation)**
  Leadership development, knowledge tranfers for CEO succession, branch lead
- **Credit Suisse AG (global financial industry)**
  Succession of key persons, project handovers, burnout prevention
- **BERNMOBIL (regional passenger transportation company)**
  Succession of key persons, train the trainer, tool training for internal coaches
- **Zürich (central administration)**
  Knowledge management concept, succession of key persons
- **Roche (global chemical industry)**
  Succession of key persons
- **Baloise (global assurance)**
  Knowledge transfer coaching for new leaders

Benno Ackermann



CEO Wissenstransfer GmbH, Lenzburg
http://www.knowledgetransfer.ch / http://www.wissenstransfer.ch
Worksphere Map©

Knowledge Transfer Coach: >750 coached knowledge transfers for key persons, train the trainer, consulting for gov. / profit / non profit organizations, realizable and enabling knowledge management concepts, establish learning organization, awareness trainings, leadership and organizational development

Lecturer: e.g. SFI, FHNW MBA, Eidg. Personalamt (EPA), HWZ, SAQ-Qualicon, ikf MBA, University Bern and St. Gallen, ETH Zürich, IFWI, internal education for gov./po/npo

Author, Springer Verlag: Erfolgreicher Wissenstransfer in agilen Organisationen / Wissensmanagement, Wissenstransfer

2007 - 2014: Credit Suisse AG, Head Knowledge Transfer, global CFO Award 2012 for KM service (cost avoidance of CHF 3.08 Mio, speed up induction phase for key persons), coaching of 450 knowledge transfers for key persons (Experts - AVP – VP – DIR - MDR – ExB, Mgmt Board)

2001 - 2007: Senior project manager blended learning and knowledge management at sunrise and Tata Interactives (Tertia Edusoft)
MAS / MBA Knowledge Management, University Lucerne

Onboarding of Key Persons
Ramp-Up / Onboarding / Deputies
Situation ASIS

New Job / Function
Role / Project
Workarea

Daily Work «Onboarding»

- Predecessor's experience
- Important internal / external customers
- Processes
- Challenges
- Expectations
- Tools

Organizational Onboarding

- Values
- Vision
- Code of Conduct
- Compliance
- …

→ eLearning, classroom training

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Onboarding of Key Persons
Ramp-Up / Onboarding / Deputies
Situation TOBE



New Job / Function
Role / Project
Workarea

Enabled by
Knowledge Transfer Coach
Expert (s)

→ Visualization

→ Prioritization

→ Shorten time to market

→ Increase quality

70:20:10

Learn at speed of business

- Directly at Workplace
- From the experts
- In context of worksphere
- Set the right priorities

Apply new knowledge to create value

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Personal Lifecycle
... from a person's perspective

Organization

Onboarding

- Optimize and fasten "time to market"
- Create job and stakeholder transparency in complex Worksphere
- Enable project rampup
- Increase quality of project delivery
- Enable key resources in work context

Daily work

- Understand complex worksphere
- Support change management
- Build "real" deputies
- Prepare for longer absences
- Minimize loss of tacit knowledge during project handover
- Prepare for potential loss of staff
- Create transparency offshoring projects

Offboarding

- Enable ++ project deliveries
- Support project rampdown (from a personal and project perspective)
- Enable seamless continuation after resignation
- Minimize loss of knowledge due to two year regulation, external staff

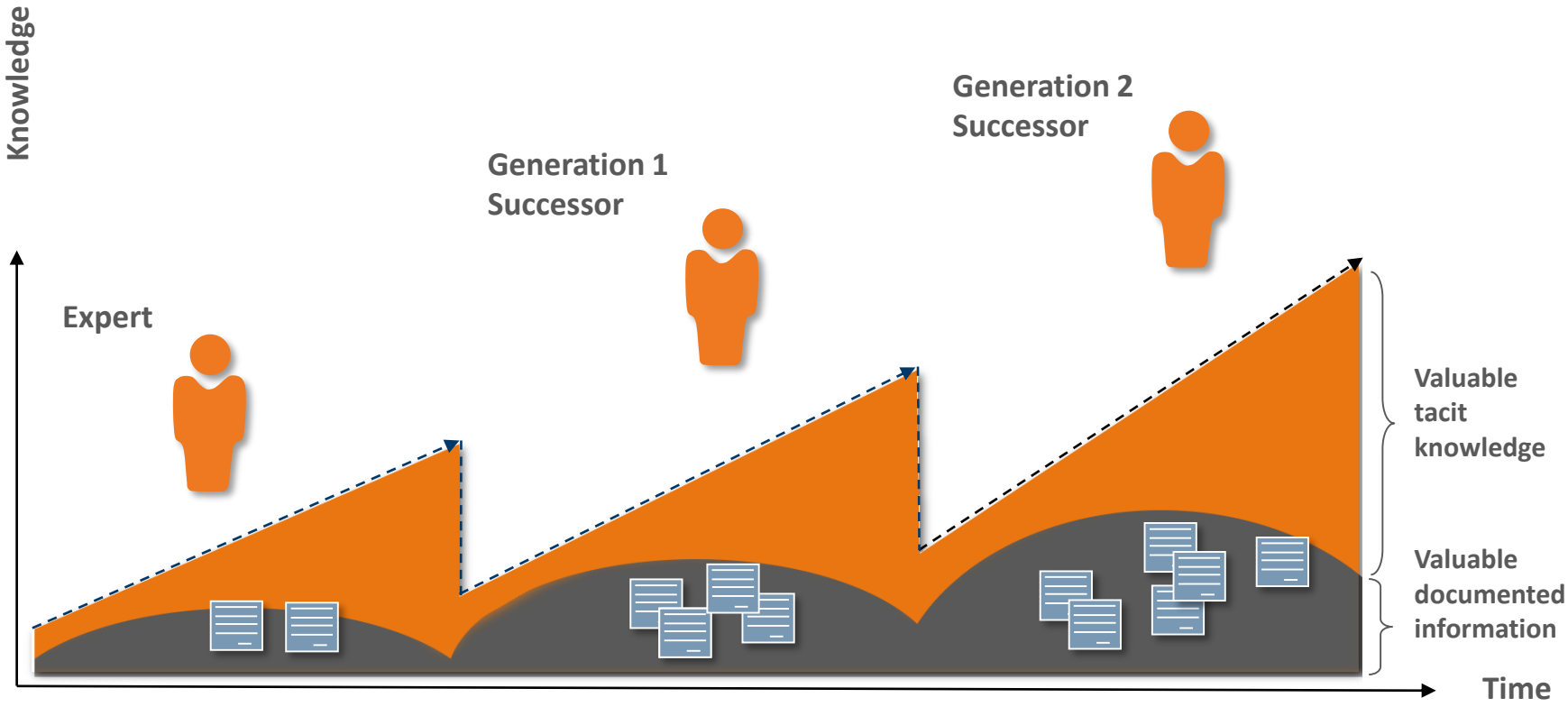
Tacit knowledge is all about people

Explicit knowledge enables its real business value only in correlation with the underlying tacit knowledge

Tacit knowledge enables us to efficiently manage our daily workflows and processes without thinking about them

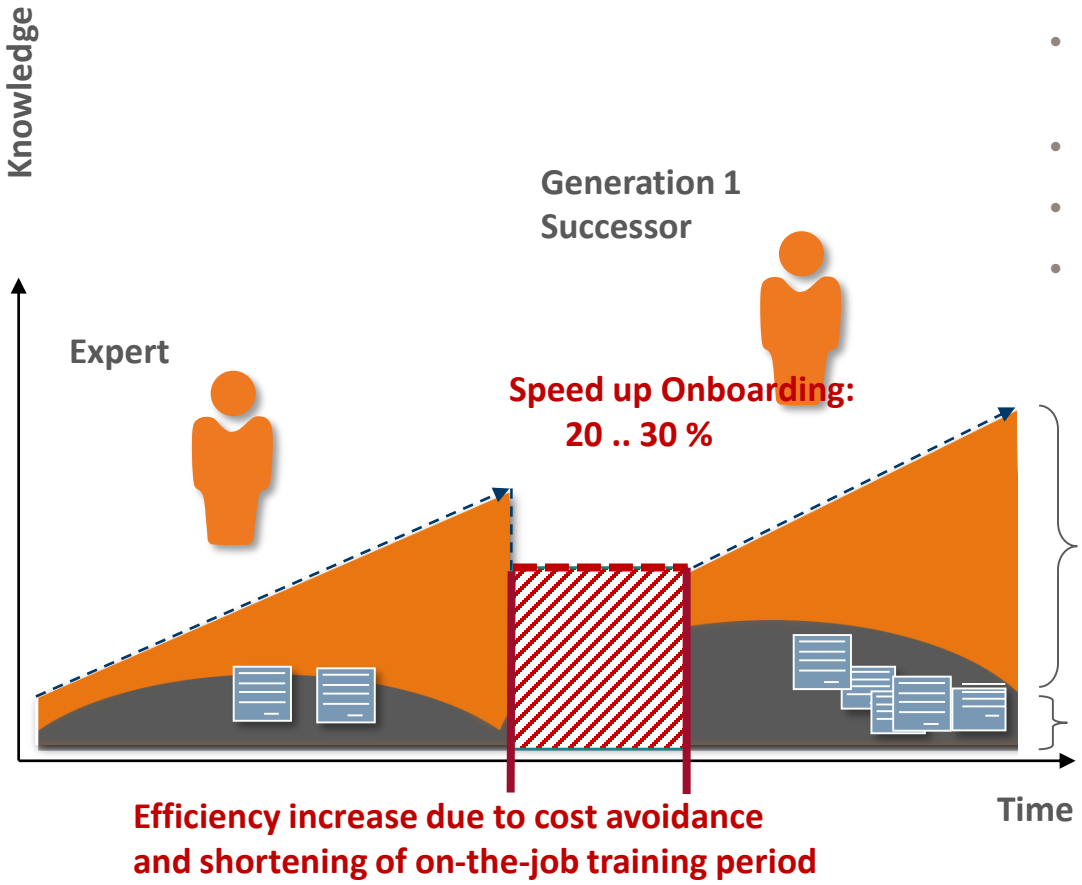


Loss of staff: influence on tacit knowledge, impact on productivity and efficiency



Loss of knowledge due to leaving of multiple experts: succession management?

Loss of staff: influence on tacit knowledge, impact on productivity and efficiency



Benefits

- Enables efficient and motivating induction period for key persons
- Minimizes loss of tacit knowledge
- Helps to reduce knowledge gaps
- Supports building personal network

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Methodology
Structured Knowledge Transfer

Phase 1-3

Initialization

PHASE 1 – Overview
Identify areas of knowledge

PHASE 2 – Details
- Option1: Transfer Person 1:1
- Option2: iCast

PHASE 3 – Documentation
Transformation: Implicit to Explicit Knowledge

Identification
Coaching: 2 half days

Transfer
Coaching: 2-3 half days

Transformation
Coaching: 1-2 half days

Feedback

Create Worksphere Map©
Prioritize Topics
Task and Induction Plan

Support (on demand)

Topic and Knowlet Structure
Mindliner, Transfer Doc
Wiki /KMS / Sharepoint / …

Line Manager involvement on a need basis

Coaching service for key employees
Transfer knowledge on a need basis
Total effort: 3–7 coached half days

Shortens on-the-job training of new joiners
Enables spreading of knowledge within a team
Increases employee motivation

Methodology
Structured Knowledge Transfer

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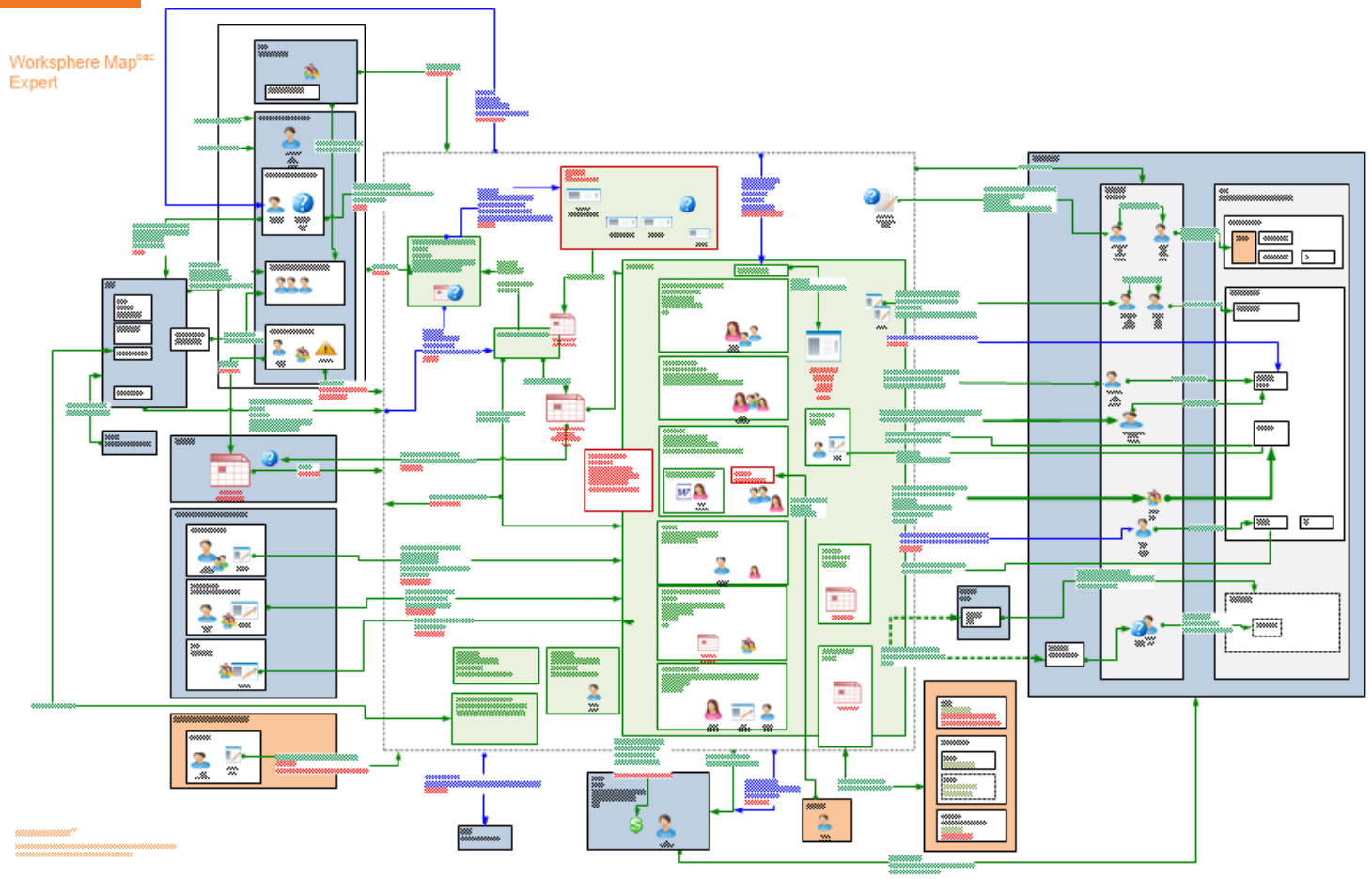
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Workproduct: Knowledge Map Visio

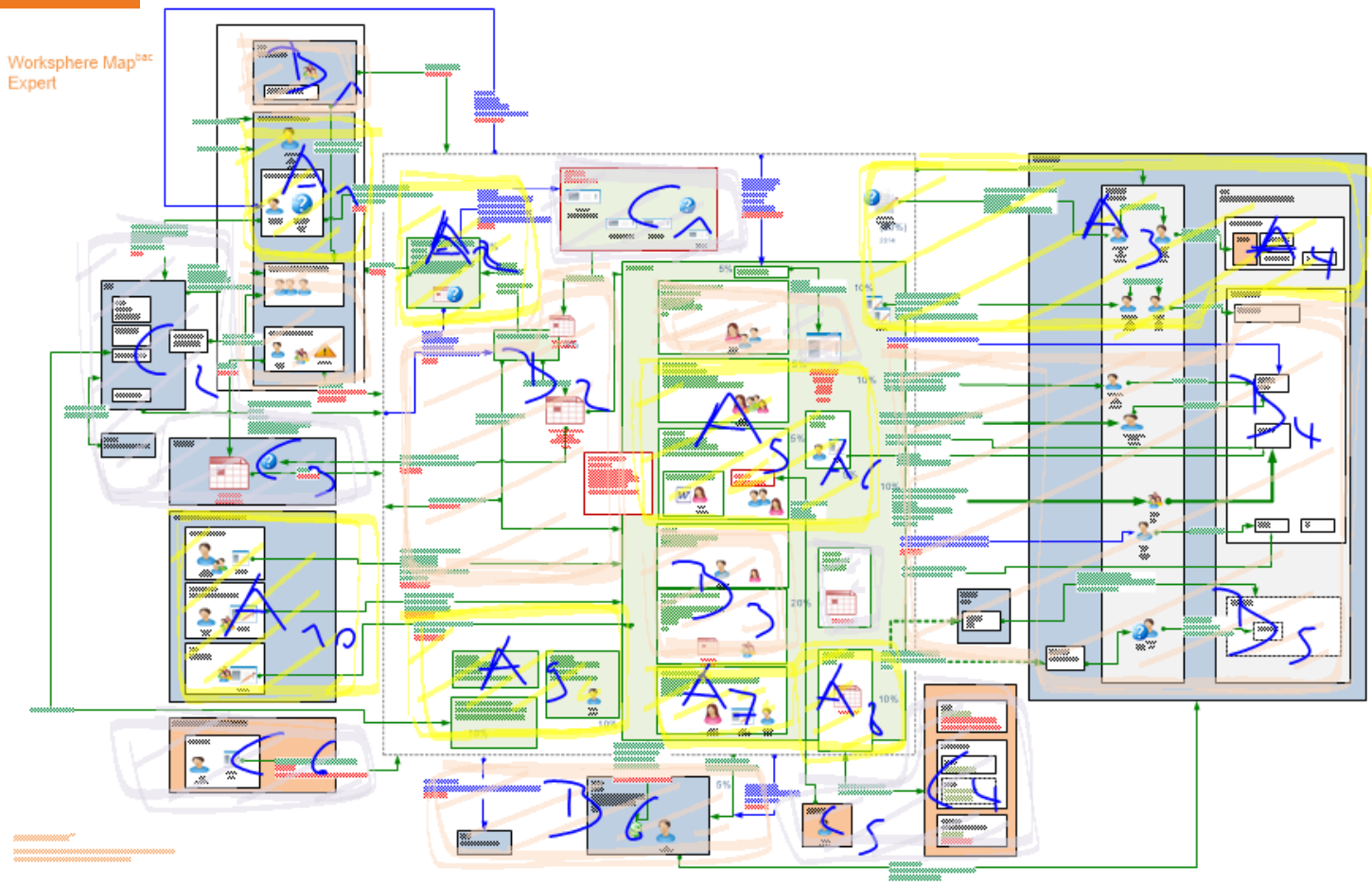
Phase 1



Structure includes
- Business area
- Processes and activities
- People
- Systems
- Business cases
- Priorities

Workproduct: Knowledge Map Prioritization of Topics

Phase 1



Structure includes
- Business area
- Processes and activities
- People
- Systems
- Business cases
- Priorities

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Methodology
Structured Knowledge Transfer

Phase 2

Initialization

PHASE 1 – Overview
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Transforation Implicit
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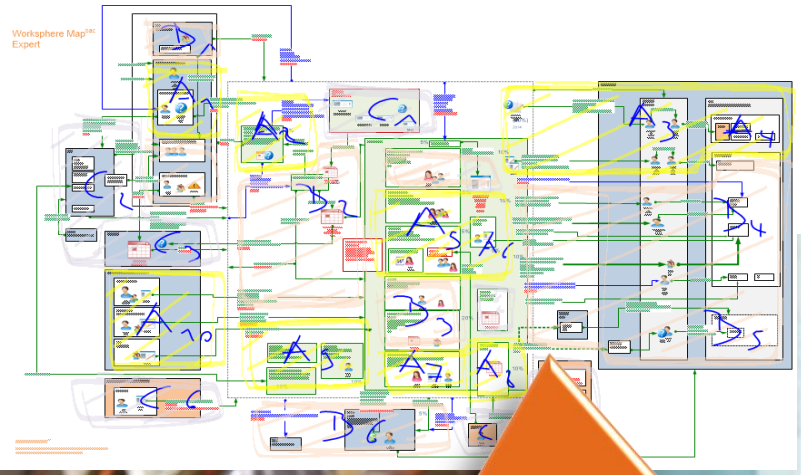
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Build up Knowledge, DO-THE-JOB PULL Learning

Phase 2



Phase 2
Option 1

Build up new knowledge: Pull principle
Assign tasks as soon as possible

Structure and priorities according to Worksphere Map

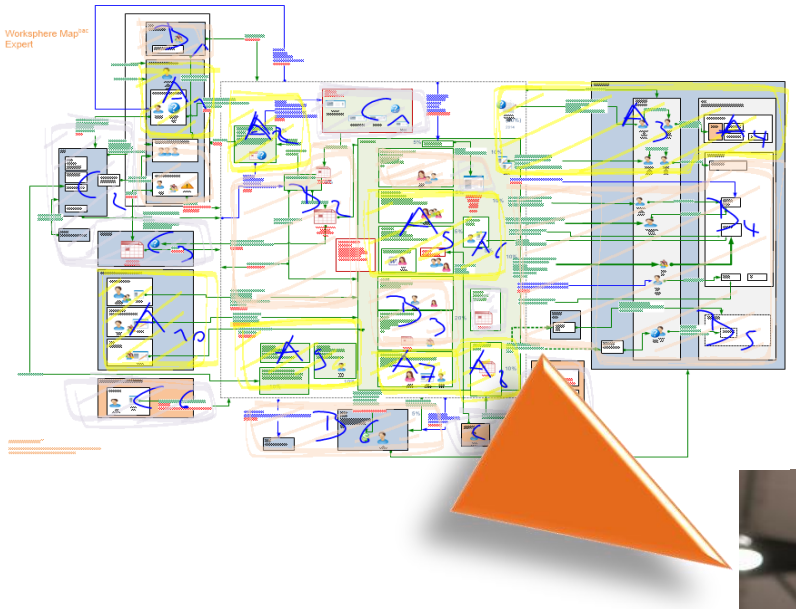






Build up Knowledge, DO-THE-JOB PULL Learning

Phase 2







Phase 2
Option 2

iCast: bridge regional or time gap
No successor available on place

Recording of expert

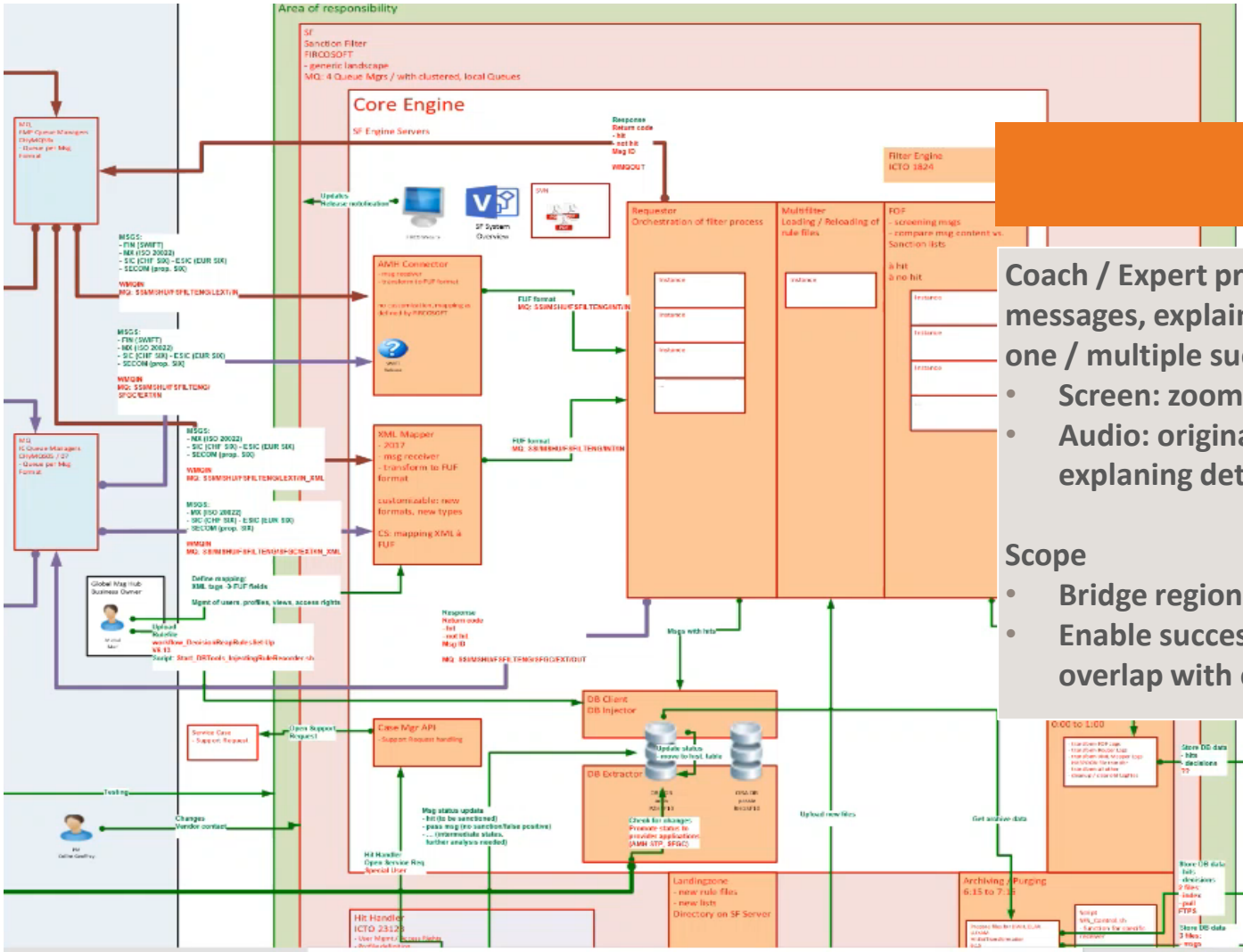
- **Worksphere Map©**
- **Daily work (screen recording, Youtube for professionals)**

Structure and priorities according to Worksphere Map

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iCast: bridge regional or time gap
No successor available on place

Phase 2



Phase 2
Option 2

Coach / Expert prepare iCast video messages, explaining the knowledge map to one / multiple successor(s)

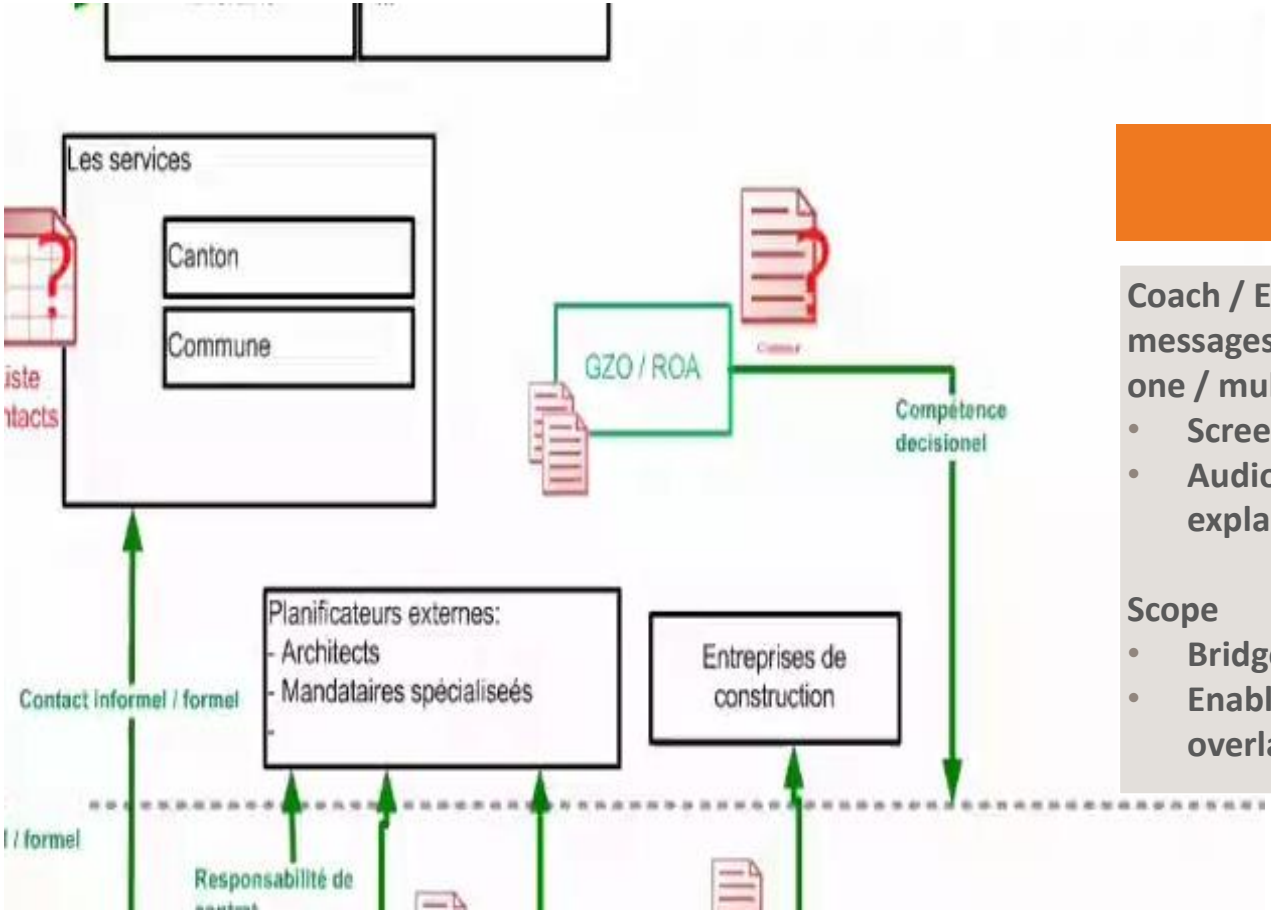
- Screen: zoom in knowledge map
- Audio: original voice of manager/expert explaning details

Scope

- Bridge regional gap
- Enable successor if there is no timely overlap with expert

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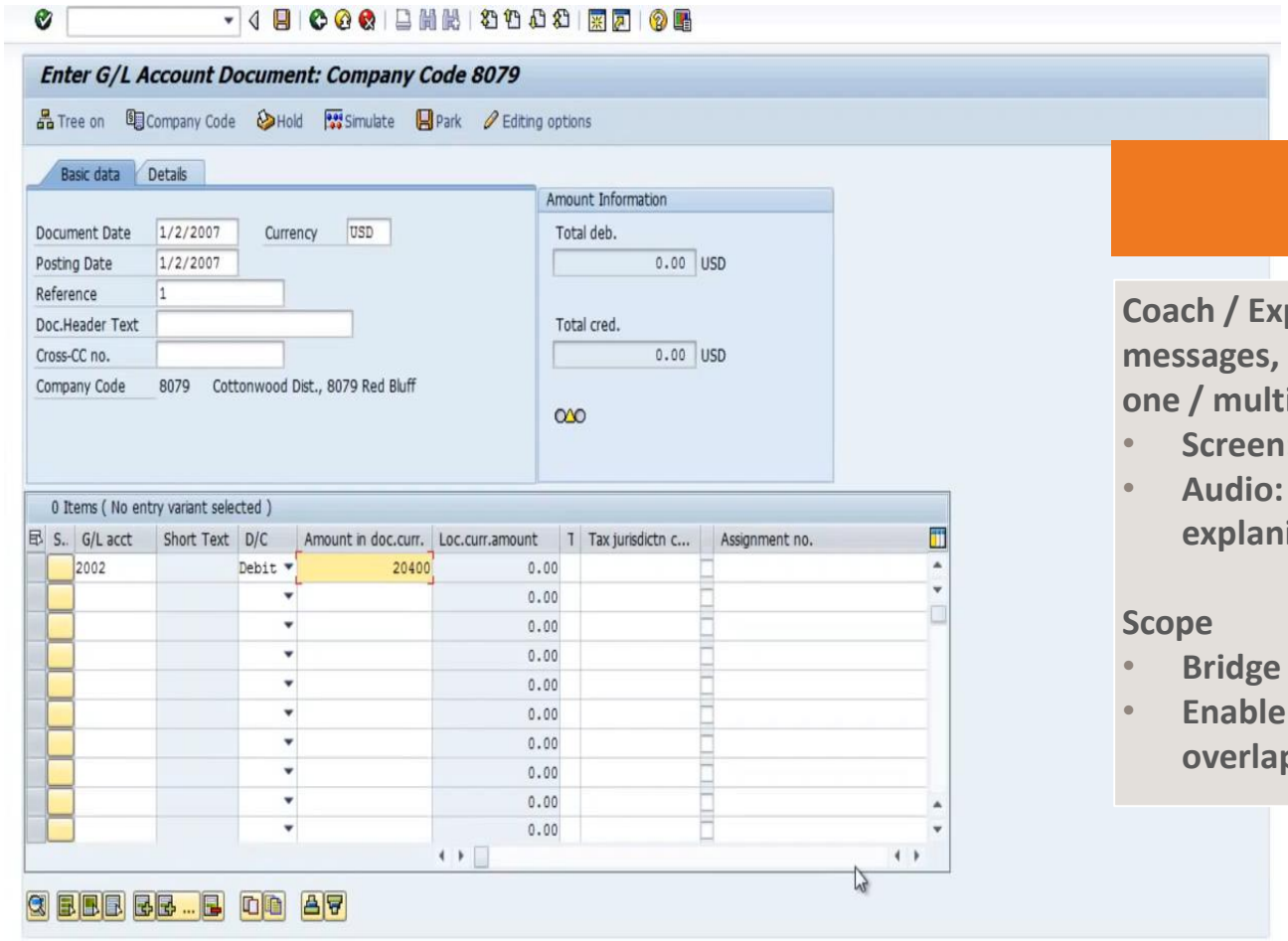
Scope

- **Bridge regional gap**
- **Enable successor if there is no timely overlap with expert**

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iCast
Youtube for professionals

Phase 2



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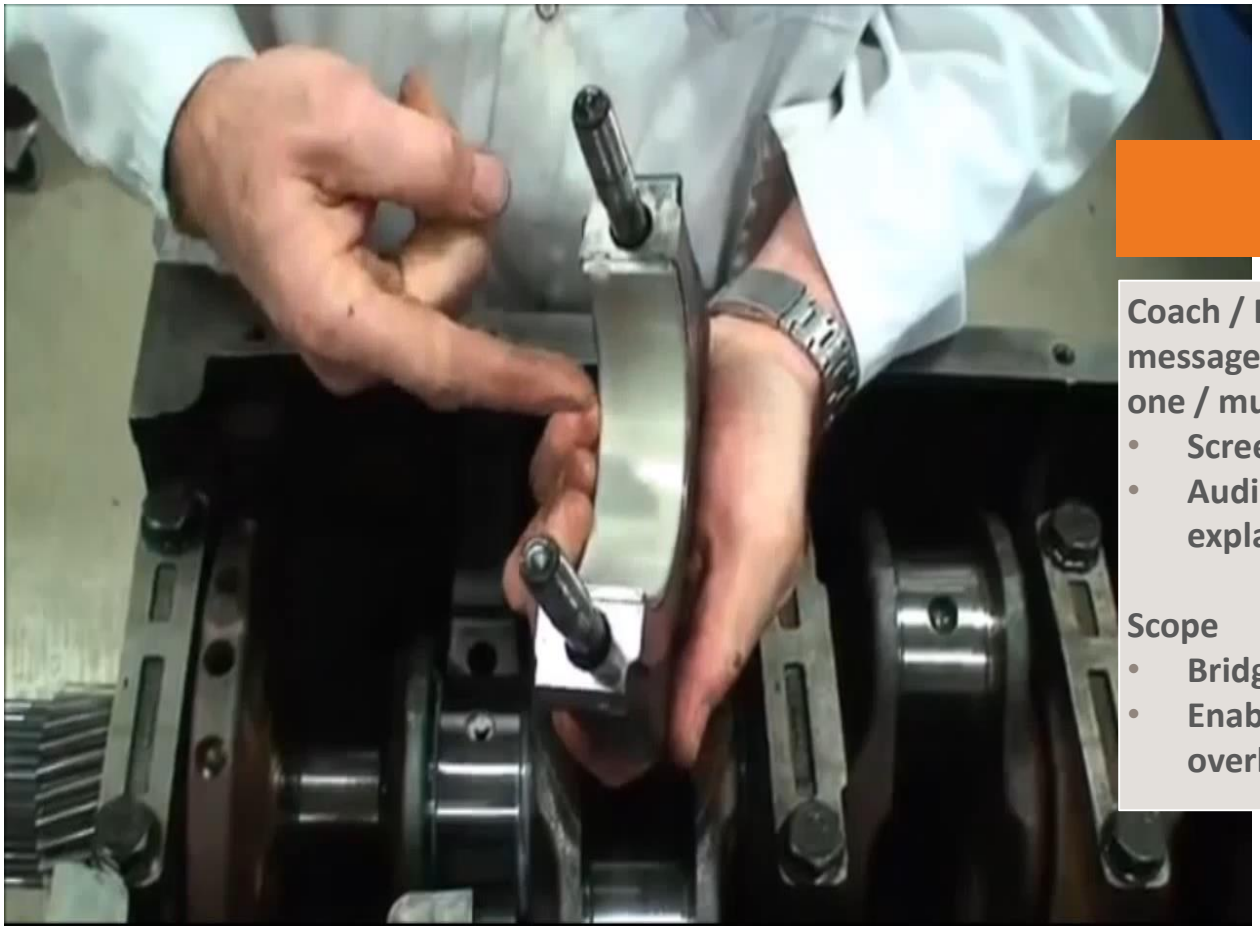
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Methodology
Structured Knowledge Transfer

Phase 3

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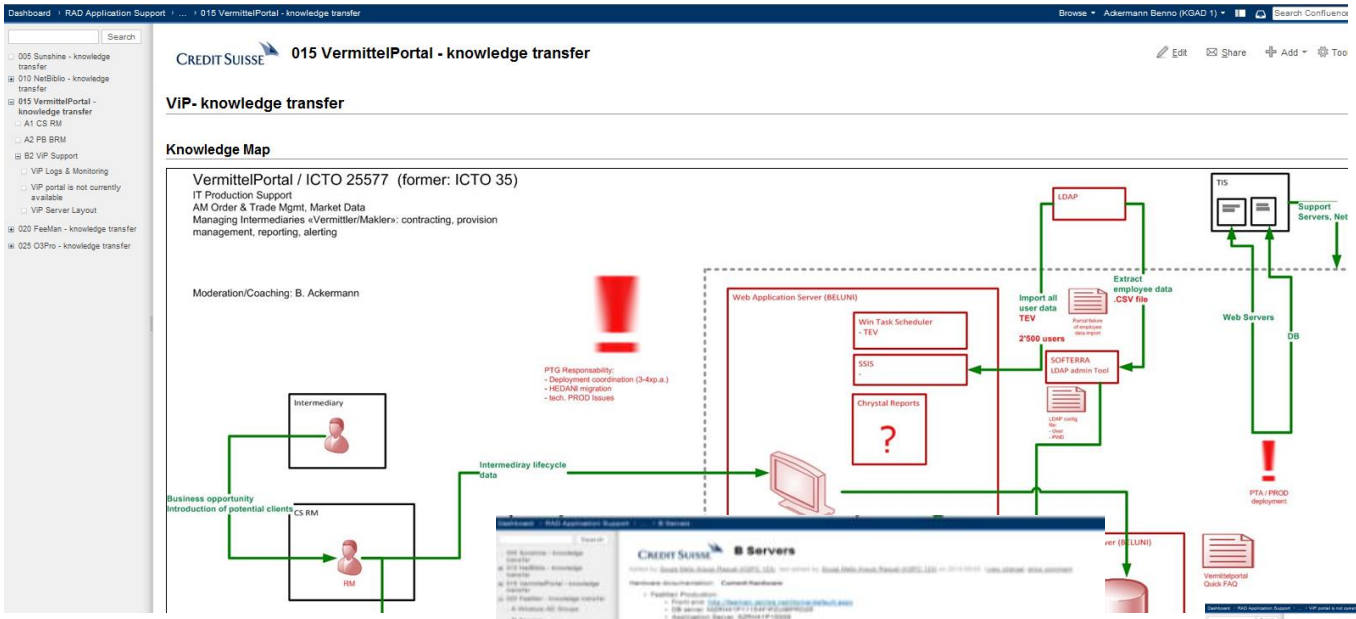
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Wiki / Transfer Document / KM System...

Phase 3

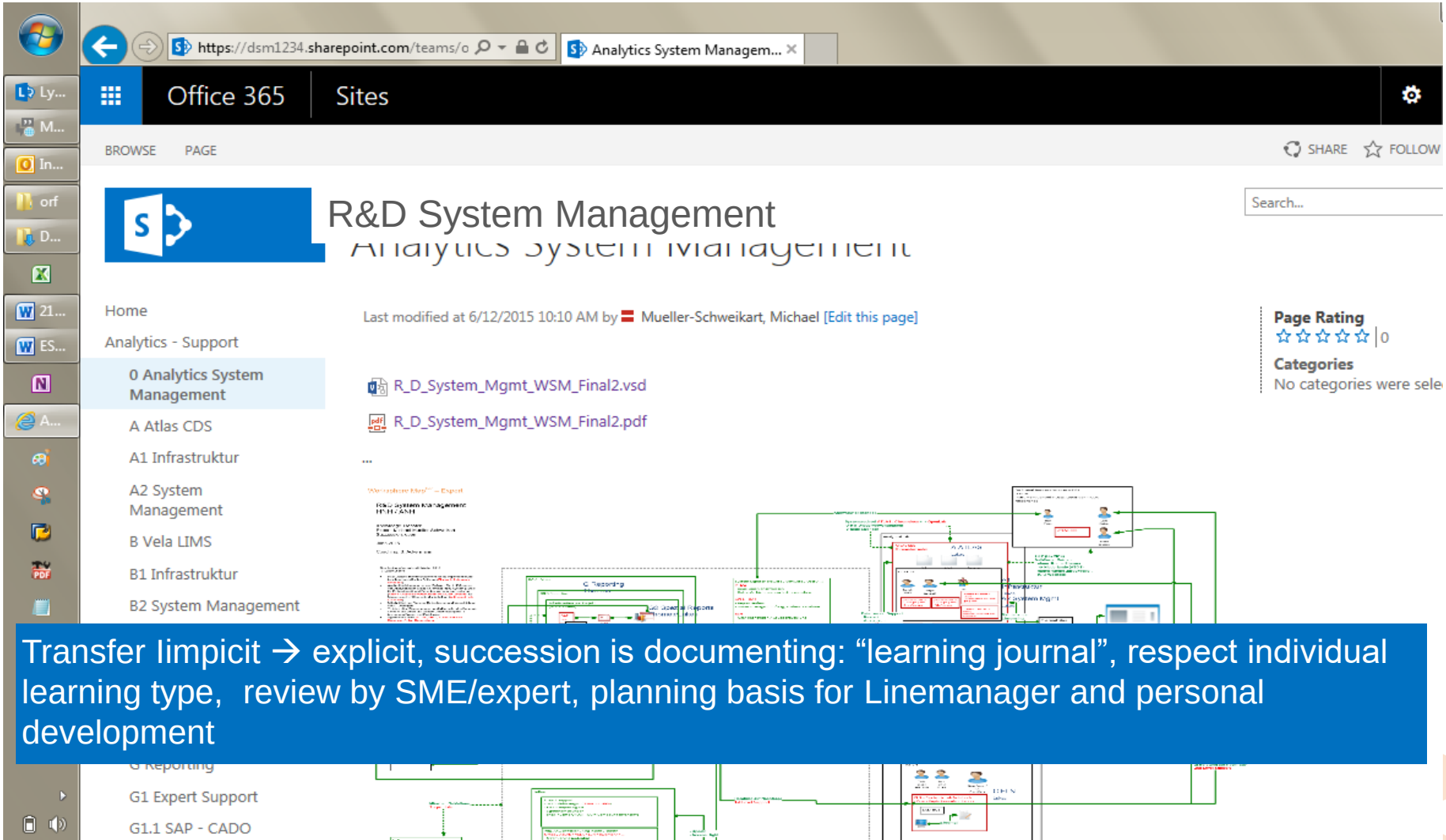


Frame for knowledge transfer pilot
Timeline
Knowledge Transfer from ... to ...
Support by KMCC
Environment for knowledge transfer
Organization
Infrastructure
Topics for knowledge transfer
In scope: Knowledge Map
Overall knowledge map
In scope: areas
Out of scope
A topic: Description
Scope for knowledge transfer
Knowledge Map
Mission statement
Strategical integration
Today's and next days hot topics
Customers expectations, deliverables Customer view
Issues / actual problems within process

Principle: Structure and methods are based on priorities of successor

Wiki / Transfer Document / KM System…

Phase 3

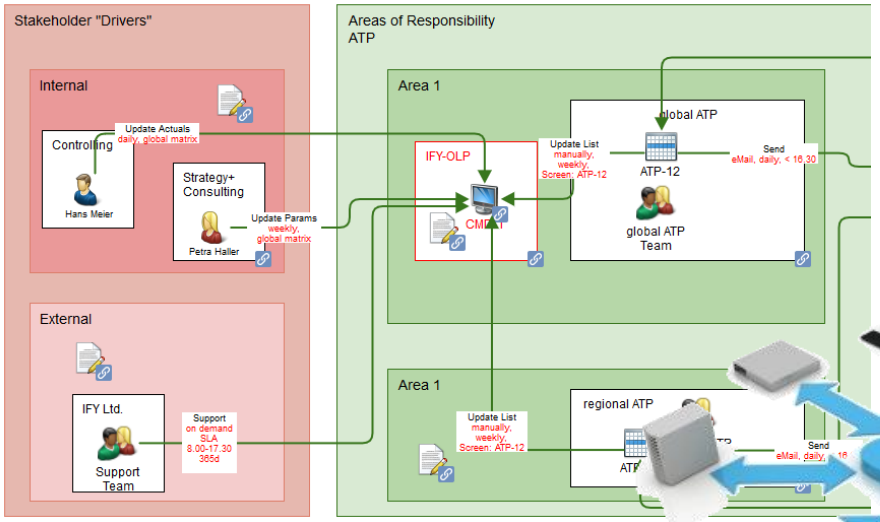


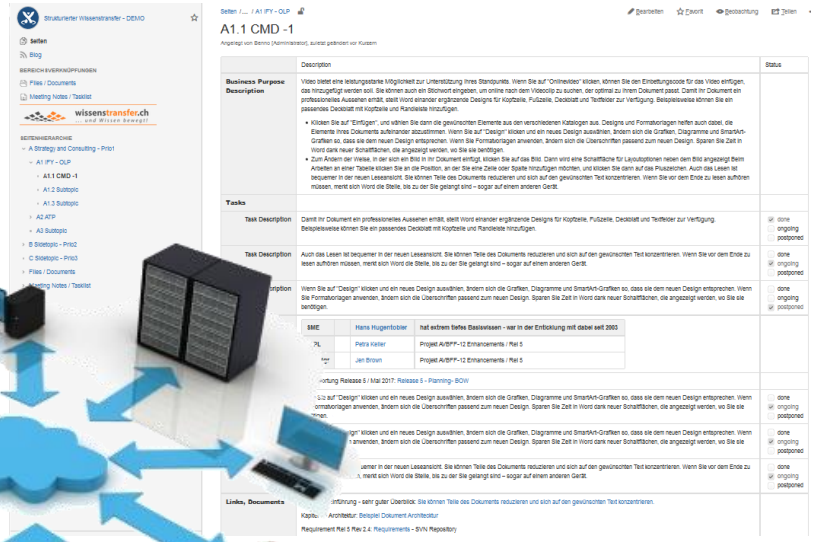
Transfer Iimpicit → explicit, succession is documenting: “learning journal”, respect individual learning type, review by SME/expert, planning basis for Linemanager and personal development

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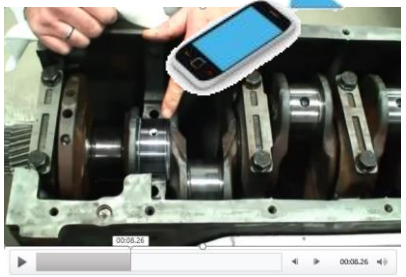
Atlassian Confluence Wiki / Gliffy Structured Knowledgetransfer

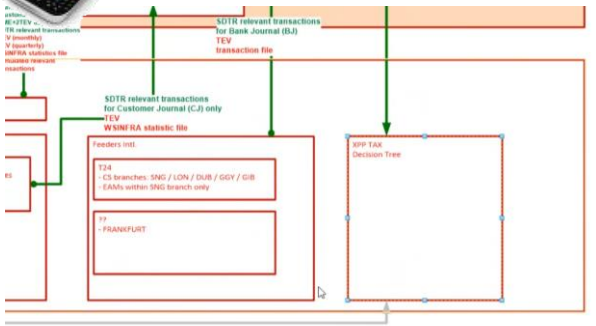
Phase 1-3









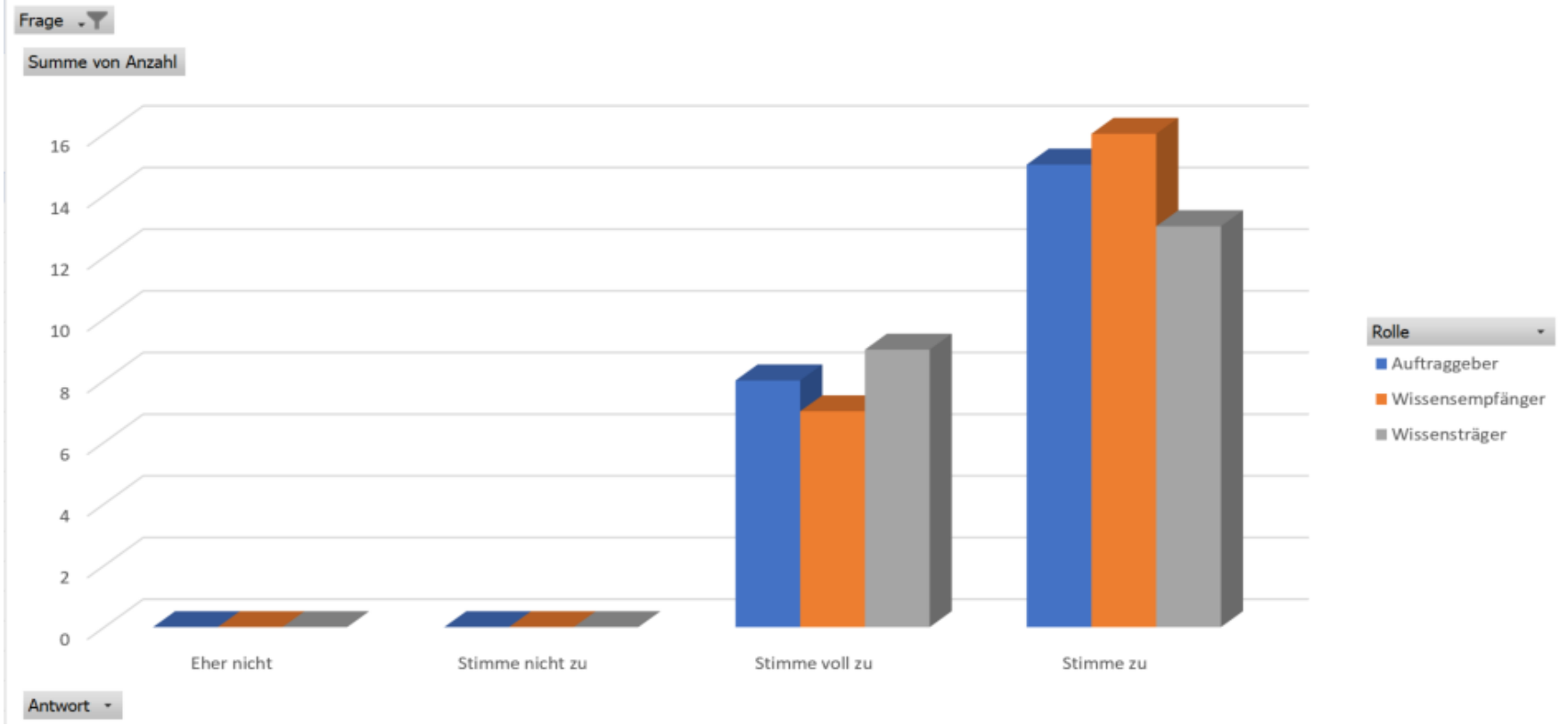


Create WorkSphere Map© over multiple team areas, structure and prioritize important topics, link to Confluence wiki pages, internet, intranet, iCasts

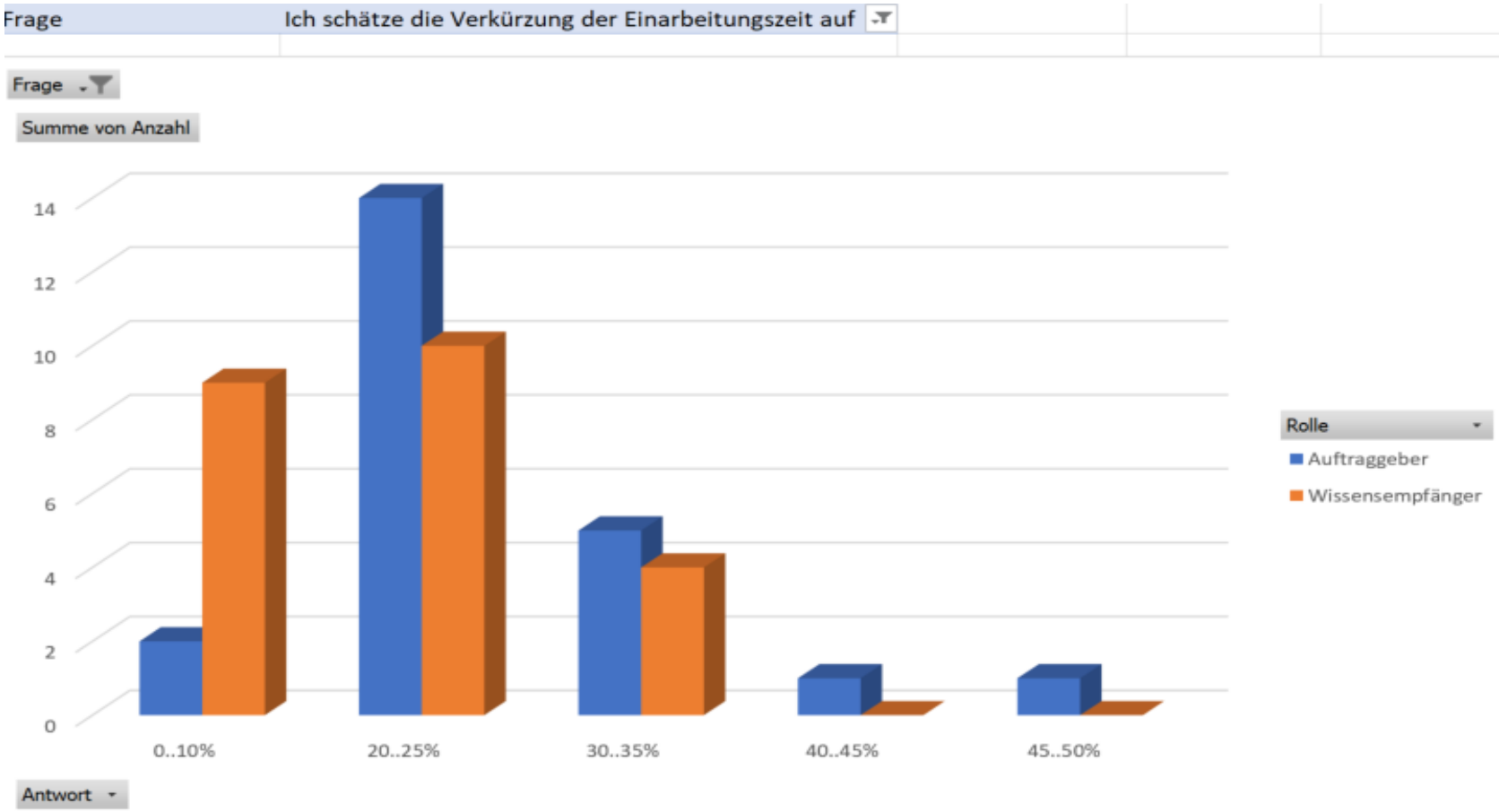
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Customer Feedbacks 2016

Frage	Der ganze Wissenstransfer-Prozess war eine gewinnbringende Unterstützung



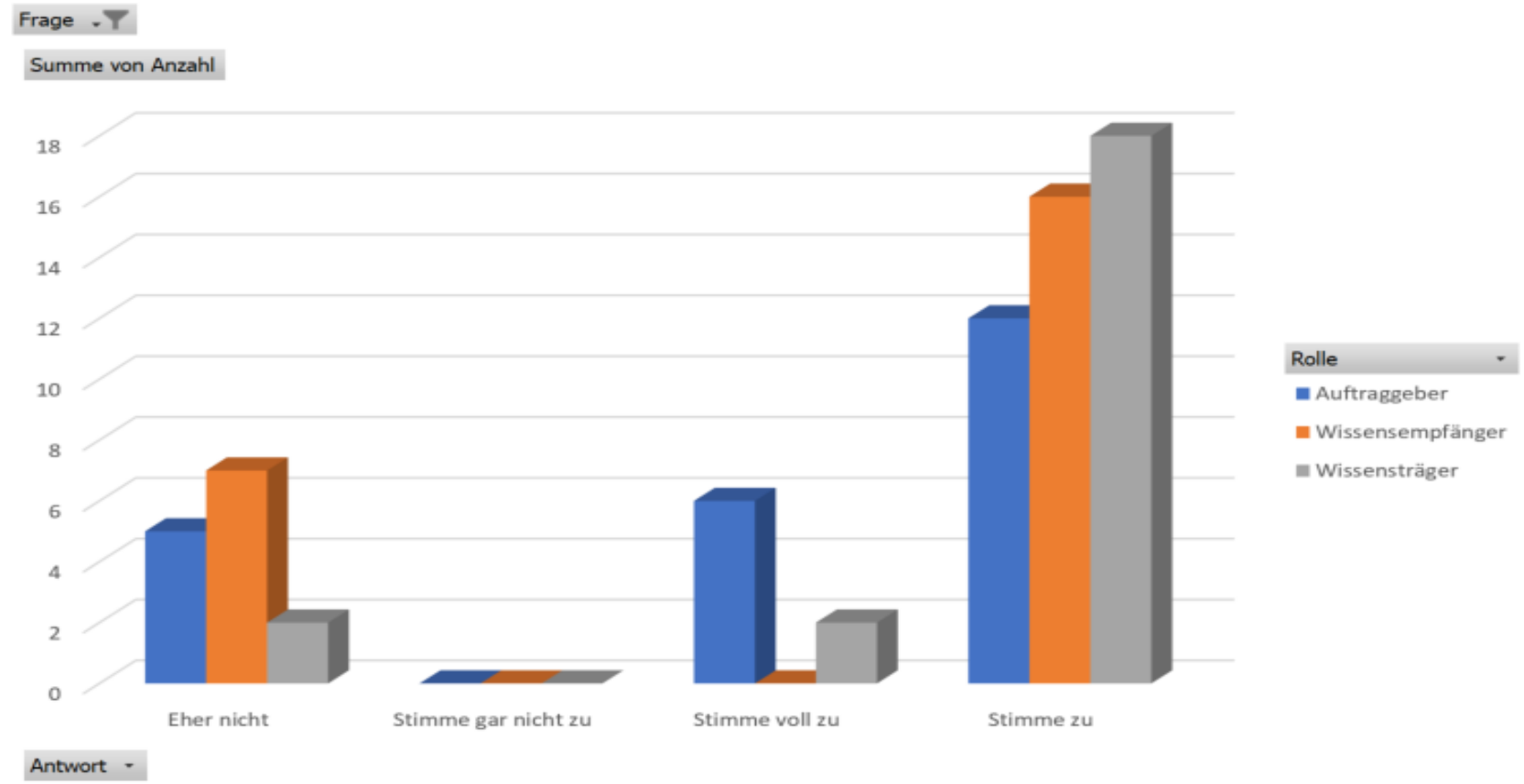
Customer Feedbacks 2016



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Customer Feedbacks 2016

Frage	Der Wissenstransfer hat das Team entlastet

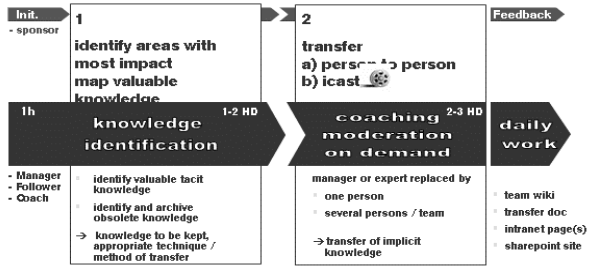


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Adaptions of Methodology Change Management

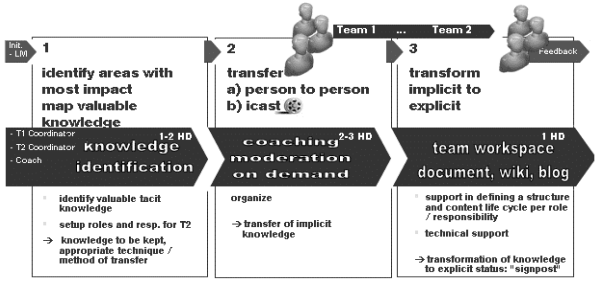
Manager on Move

- Increase “Time to Market” of keyperson
- Create stability and continuity in organization
- Realize potential for corporate development



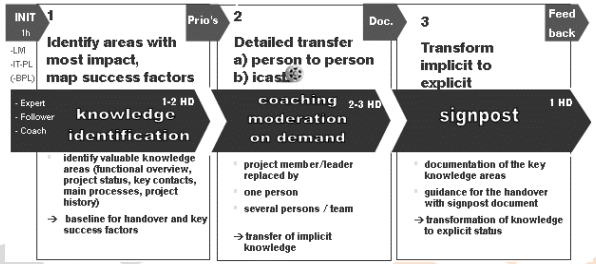
Team on Move

- Support an enable reorganizations
- Avoid loss of knowledge due to organizational changes
- Build up efficient deputies and support transition of team



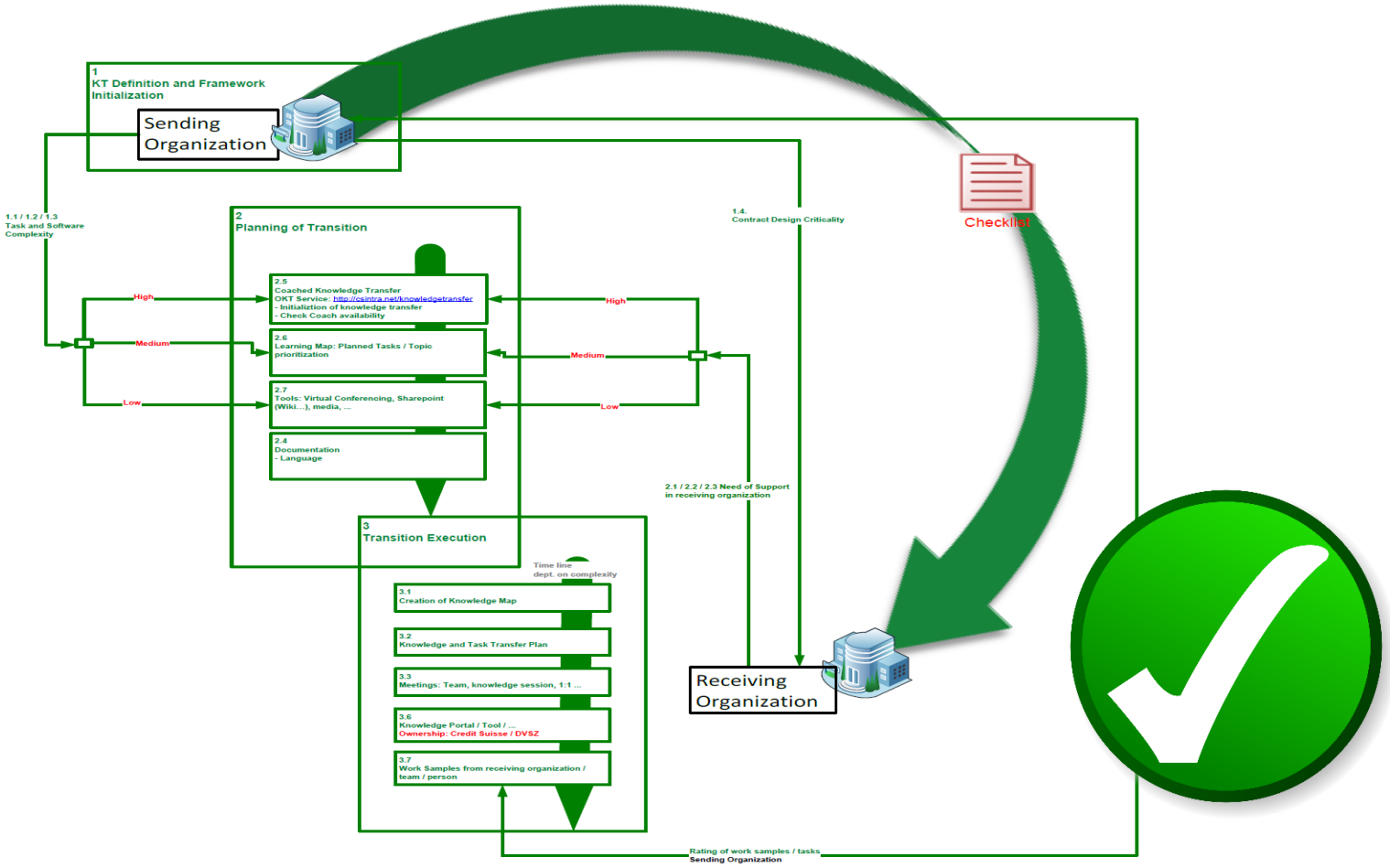
Optimized Project Handover

- Reduce risk due to project change
- Fasten induction for new PM or team
- Enable efficient rampup or rampdown of projects



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Actual/Future Challenges Outsourcing Offshoring – Nearshoring - Backshoring



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Checklist

Preconditions

- [ ] 1–3 months time frame for knowledge transfer (with or without overlap expert-successor)
- [ ] Awareness of preconditions/starting situation/involved persons
- [ ] Investment: 3–6 half days for coached methodology
- [ ] Investment: Silver (CHF 3500.-), Gold (CHF 4500.-), Platinum (CHF 6500.-) Package

Coaching: steps to success

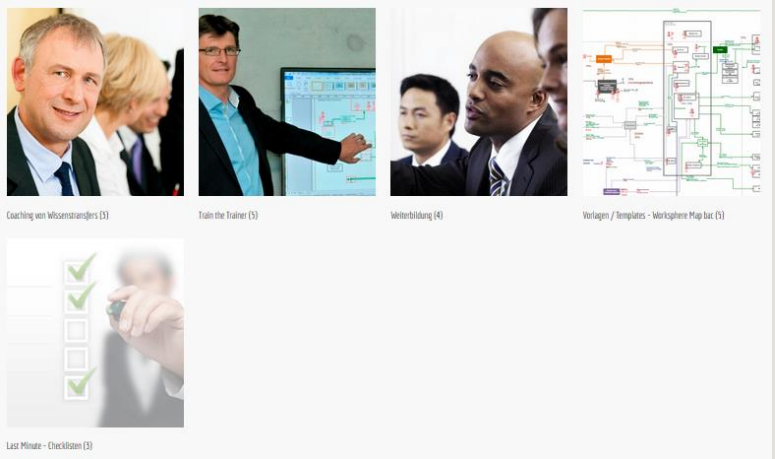
- [ ] Initialization with line manager, expert, successor to clarify situation, scope and concrete next steps
- [ ] Phase 1: Creation of knowledge map, prioritization of topics
- [ ] Phase 2: Detail knowledge transfer, additional knowledge map or coaching on demand
- [ ] Phase 3: Team/individual Wiki or transfer doc

Coaching / Train the Trainer / VISIO Templates / Symbols / Checklists

Webshop

- Coaching: Silver / Gold / Platin
- Train the Trainer
- Templates
- Stencils / Symbols
- Checklist

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Summary

Service aims to maintain and spread tacit knowledge within the company

- Maintain efficiency and effectiveness through personnel and organizational changes
- Keep high quality production standards
- Cost avoidance/increased time to market of CHF 3.08 m in 2013(based on LM feedbacks)

Optimized knowledge transfer is based on 3 distinctive phases

- Support manager to identify key knowledge holders and to map their tacit knowledge while reducing production risks
- Focus on successor to enable a motivating and structured start in new role
- Estimated effort for successor and expert between 2 and 6 half days
- Shorten on-the-job training period of new joiners by an average of 30%

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Thank You!

Contact / email

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ENG www.knowledgetransfer.ch www.worksphere-map.org

benno.ackermann@wissenstransfer.ch



