Knowledge Retention: Protecting Corporate Memory

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IN JANUARY 2011 the first baby boomers reached retirement age and, since then, over 10,000 boomers reach this milestone every single day in the US. This pace will continue until 2030.¹ The UK saw a 30 per cent increase in the number of people turning 65 in 2012, compared with 2011.² When these figures are combined with a job market in which employee’s (particularly millennials) expect and are willing to move from company to company in order to ensure their own personal career development, the risk of knowledge loss is severe. Through a series of articles and case studies, this report considers the ways in which these risks can be mitigated, as well as the knowledge risks associated with the under-utilisation or loss of knowledge critical to organisational performance.

The most prevalent risk of knowledge loss will differ depending on the organisation – for some, the risk of employee retirement en masse could prove critical, whereas for others the risk of knowledge loss as a result of the circumstances and attitudes of the generation Y workforce may be a bigger concern. In addition to the imminent retirement of the baby boomers, a staggering ninety-one percent of millennials expect to stay in a job for less than three years, meaning they will have 15–20 jobs over the course of their working lives.³

Whatever the primary risk is, neither will exist in isolation and the potential impact on business continuity and efficiency will be substantial. Research suggests that direct replacement costs can reach as high as 50–60 per cent of an employee’s annual salary, with total costs associated with turnover ranging from 90–200 per cent of annual salary.³

Whilst there is no one size fits all approach to the challenge of knowledge retention, the report’s opening contribution discusses some key questions to ask and issues to consider when determining a knowledge retention strategy, as well as some common retention approaches. One key consideration when implementing a knowledge retention strategy is identifying the critical knowledge which needs to be captured and consolidated; one article provides a step-by-step approach to use when approaching this challenge. Once critical knowledge areas are identified, a methodology for developing and capturing this knowledge can be implemented to develop an internal and external knowledge network; one such methodology is outlined in another article.

One expert contributor outlines the key factors of a knowledge retention strategy which minimises organisational loss as a result of employee retirement, including prioritising, transferring, and embedding the knowledge held by these experts. The article draws on over ten years’ experience of working with retiring employees to reflect on some best practices for knowledge retention. Another contribution from a workforce development, training, and consulting company reflects on the steps they take
when working with their clients to implement successful knowledge retention programmes and foster a culture of learning.

However, the knowledge retention process does not begin when employees retire or exit the company. Another article discusses how knowledge retention can and should be integrated into all phases of the employee lifecycle, in order to maximise knowledge capture and ensure the knowledge which is retained is being used effectively, even before new employees begin their first day on the job. Once they have begun in their roles, communities of practice (CoPs) can be used as an effective tool for ongoing knowledge capture and transfer. One article outlines some best practices for initiating CoPs which can fulfil social needs, encouraging employees to share knowledge which will then be retained, even if they do chose to leave an organisation. Storytelling can also be used as an effective knowledge retention tool, and this is explored in another contribution.

In one sense, the final step in a knowledge retention programme is ensuring the knowledge that is captured is transferred and used effectively. It should not be assumed that this is a seamless process. One article offers a wider framework in which to consider knowledge retention which considers not just the knowledge being captured, but also the organisational and individual behavioural factors, to ensure that recipients are actually able to apply their new knowledge effectively.

The report also features an in-depth case study profiling the knowledge retention strategy within Israel Aerospace Industries. This encapsulates both unstructured knowledge transfer processes, such as on-the-job-training, and structured processes that create tangible knowledge assets, which are applied to both retiring experts and groups of experts continuing to work in the organisation. Another case study discusses the challenges and strategies for knowledge retention within Oxfam International, a fast-changing environment with a high staff turnover.

Without a sound knowledge retention strategy, an organisation will have to deal with the resulting ramifications to their efficiency, reputation, and bottom line. This report provides a collection of expert insights and frameworks to mitigate these risks, as well as practical case studies illustrating effective knowledge retention strategies in practice.

References
About the authors

Iqbal Fajar is an executive director of Knoco Indonesia, and is an experienced consultant with a specialty in knowledge management and organisational network analysis. Starting his career as a business consultant, Iqbal has broadened his experience by assigning himself to various projects throughout his professional years, such as business process improvement, organisational network analysis, knowledge management, organisation survey, and ISO systems. Iqbal is also an experienced speaker and facilitator, using storytelling methodology to raise audience awareness. His client base includes various industries such as banking, oil and gas, and state owned companies.

Being a social network analysis practitioner, Iqbal helps Knoco Indonesia clients by clarifying social and organisational networks, identifying key persons, solving information bottlenecks, and providing working solutions. Iqbal’s marketing background and Masters degree in Business are put to work for Knoco Indonesia and its clients in branding and positioning strategies. Iqbal lives in Jakarta and manages a blog focussing on knowledge management and network analysis. He likes to spend his spare time reading books and touring on motorcycles.

Jose Carlos Tenorio Favero (BSc Information Science and Masters in Community Management and Business 2.0) is head of knowledge management at GMI SA Consultant Engineers, a leading engineering consultancy firm based in Lima, Perú (MAKE award nominee 2013).

An information scientist, Jose focusses on developing knowledge management in a practical and efficient manner. He is recognised in the region as one of the leading subject matter experts and authors. His blog, Knowledge management in action, goes beyond exploring the basic principles of knowledge management. It provides different models, methodologies, and lessons learned that all general managers must be aware of in order to develop effective knowledge management.

In addition to his writing and research, Jose works with ECOTEC, an environmental consultancy firm associated with GMI, in developing knowledge management and impactful organisational learning, critical knowledge acquisition, and retention. Jose’s Twitter handle is @josecarloskm.

Avi Kedem has been the Israel Aerospace Industries (IAI) chief knowledge officer since 2007. He is responsible for managing and leveraging the IAI’s knowledge for present and future benefit, including:

- Knowledge continuity/retention and transfer;
- AAR, BAR, and implementation of lessons learned;
- Portals – Performance support knowledge bases;
- Communities of practice; and
- Transferring knowledge from past projects.

He also shares knowledge with managers, professionals, and KM communities in Israel and internationally.
Until 2007, Avi spent 20 years as the MHT research and development director (MHT is the technical publications and training division of the IAI).

Avi founded eLearning for the IAI between 2000–2006, a comprehensive learning system for the company’s 17,000 employees. He developed the concept, method, and solutions for the ‘Supporting the human factor suite’ for managers, operators, and maintenance crew. This integrated solution combined training, training aids, user friendly manuals, electronic documentation, semi-simulators, eLearning, and EPSS. Avi can be contacted at akedem@gmail.com and on +972-52-3663946.

Michael Kelleher is a principal consultant in DNV’s Knowledge Management Advisory Services team and has been researching and consulting in the related fields of organisational learning and knowledge management for around 25 years. His earliest work on knowledge transfer led to a PhD from the University of Bath and elements of lessons from those studies remain influential to his current practices. Mike is currently leading DNV’s supporting knowledge retention and transfer in the decommissioning of the UK’s civil nuclear legacy.

Moria Levy, PhD, serves as CEO and owner of ROM Knowledgeware, the largest KM solutions firm in Israel. Levy has over 25 years’ experience, among them 15 years in knowledge management.

Levy is the chairman of the Israeli Knowledge Management Forum, which unites all KM parties in Israel.

Levy leads the expert committee for Knowledge Management of Israeli Standards Institute and led the development of the KM Israeli ISO standard 25006.

Levy has published several research articles in KM and is the author of the book 21st Century Management.

Ken Mall is the managing director of EDSI Consulting. He has more than 20 years of leadership experience working with top-tier companies, labour organisations, and government agencies identifying the skill needs of their workforces, and developing and implementing solutions to meet those needs. His vision and expertise in workforce development has helped organisations with notable growth in the technical skills of their skilled workers.

Nationally, Ken has been working with the public transit industry on certification and maintenance training standards projects, as well as many joint labour/management training projects throughout the United States. Ken holds a Bachelor of Business Administration and a Master of Science in Corporate Finance and Economics from Walsh College.

Established in 1979 and headquartered in Dearborn, Michigan, EDSI is a workforce development, customised training, and consulting company intertwined with one common thread: helping people and companies in transition. EDSI has grown to a network that employs more than 400 people across the country. EDSI’s professionals support a broad range of industries including: manufacturing, workforce development, utilities, transit, automotive, logistics, retail, food services, hospitality, education, and training. EDSI has experienced rapid growth in recent history, illustrated by its inclusion in Inc. Magazine’s 500/5000 list of the nation’s fastest growing private companies for five straight years. For more information, see www.EDSIsolutions.com.

Javier Martinez is a native of Spain and has lived in Chile since 2002. He is the KM manager at Catenaria and he is the director of Knoco, Chile, currently working as a consultant for the United
Nations and several different private companies. Javier obtained a law degree from the University of the Basque Country and a Masters degree in Internet Management from the Catalonian Institute of Technology. Javier previously worked with the World Bank as a consultant in the area of knowledge management, and with the Inter-American Development Bank as a consultant in the field of communication and learning. Javier can be contacted at jmartinez@catenaria.cl and javier.martinez@knoco.com, and his Twitter handle is @javitomar.

Margaret McNaull is head of the Project Management Centre of Excellence, AstraZeneca. Margaret has 20 years of experience in global drug development during which she has held a range of technical, line, project, and programme management roles. Margaret played a key role in the team that delivered AstraZeneca’s first novel anticancer agent IRESSA which is now licensed around the world for the treatment of lung cancer and has led many large scale change programmes. Margaret currently heads the Research and Development Project Management Centre of Excellence, a group tasked with creating and driving project management excellence across Research and Development in AstraZeneca. Margaret leads a global team with team members based in the UK, Sweden, and the US.

Gabriele Sani joined Oxfam in 2011 as intranet manager. One year later Oxfam’s global intranet, Sumus, saw a 128 per cent increase in unique monthly users, an 80 per cent decrease in support requests, and an overall increase of 465 per cent in the team performance. Before Oxfam Gabriele was working on World Vision’s intranet, where he applied his experience as a consultant for other charities and UN agencies with technical knowledge acquired at Autonomy Ltd.

Gabriele holds a MS in Physics and a Masters in General Management.

Kacie J Walters has more than 18 years of experience in the fields of training, organisational development, and knowledge management. She has created learning and knowledge management groups at four different organisations all focussed on process improvement and measuring value. She has developed multiple organisational design, onboarding, and people development strategies; led enterprise intranet and knowledge management system implementations; created countless business and sales training programmes; and formulated company-wide best-practice sharing and knowledge capture programmes.

Kacie is the director of knowledge management at Forsythe Technology in Skokie, Illinois. She leads a small team to manage and share intellectual property, knowledge, and best practices internally, deploy and manage a new social intranet, along with establishing key processes, systems, and performance management plans to help support the vision of being a knowledge-sharing organisation.

Kacie writes her own blog – In the know – focussed on knowledge management, collaboration, and general management topics. She also participates in developing and delivering workshops for the Career Resource Center – a non-profit organisation in the Chicago area dedicated to helping people find and transition into new employment opportunities. She graduated from Indiana University with a BA in Political Science and from the University of Illinois with a MA in Communication.

Larry Todd Wilson has been entrusted by hundreds of the world’s top performers and subject matter experts (SMEs) to help them articulate, systematise, and create extraordinary value for their hard-earned insights. In collaboration with the SMEs, Larry has produced award-winning commercial
learning systems, patentable subject matter, trade secrets, and management systems for departments and enterprises. He has authored dozens of articles, book chapters, conference presentations, and workshops, and has served as a knowledge management thought leader for several organisations.

Larry is the Founder of LearnerFirst (1992), first-to-market with commercial products which packaged experts’ intuitive know-how as learning-while-doing software applications; Knowledge Harvesting (1999), the world’s most-advanced commercial methodology for making tacit knowledge explicit; VirtualCollaboration.com (2003), the first method embedded in social media used to launch hundreds of online communities; Work Profiling (2009), the award-winning tool that obsoletes job descriptions; and SmartGridView.com (2010), the platform which delivers a solution for commercialising systemic knowledge.

Larry’s capability comes from a unique confluence of learning theory, problem-solving methodology, visual-arts communications, systems thinking, and software engineering. He delivers a rare, valuable result – tangible knowledge assets.

Sapta Putra Yadi is a director of Knoco Indonesia and has more than 32 years of experience in various industries, such as manufacturing, timber, mining, and oil and gas. He has been involved in several different areas such as production planning, production operations, contracting, project control, human resource management, and knowledge management. As HR corporate vice president, he initiated and was directly involved in developing end-to-end knowledge management for MedcoEnergi, the biggest private owned oil and gas company in Indonesia. Since 2010 he has run his own business as an HR and KM consultant, involved in several HR and KM consulting and training services for mining, oil and gas, and banking companies.

Sapta is an industrial engineer from ITB Bandung, Indonesia and has a Masters degree in HR Management from Rutgers University New Jersey, USA. Currently he acts as the president of the Indonesian Society for People Management as well as Asia Pacific Regional Training and Development Association (ARTDO International). Sapta lives in Jakarta, Indonesia.