Knowledge Transfer: More Than Just Hype, Learning How to Share Your Knowledge

Robert Eubank, Peak RC
Learning Objectives

As a result of this learning activity, you will be able to:

– Define what Knowledge Transfer is
– Describe the difference between explicit knowledge and tribal (tacit) knowledge
– Describe how adults learn
– Demonstrate your ability to capture your own tribal (tacit) knowledge
Once upon a time, there was an overcurrent relay installed on a transformer.

The transformer became overloaded one day, when a transmission line was switched out-of-service for maintenance.

The System Operator noticed that the transformer was overloaded but still below what he knew was the trip point of the relay.

10 minutes into trying to off-load the transformer, the transformer relayed (loading was still below what the system operator knew the trip setting to be).
Why Embrace Knowledge Transfer?

• Why should we even try to embrace Knowledge Transfer as an individual and as an organization?
  – Average age of the U.S. workforce is 42, in the next five years the younger generation (Millennials) will take the workforce staffing by storm. In the next five years they will comprise 50% of the workforce.

• There needs to be a willingness to accept, learn and give knowledge that is beneficial to the betterment of the individual and the company.
  – This requires special attention to how generations interact within your business – especially when recruiting.

• By creating a culture of Knowledge Transfer, individuals and the organizations benefit as a whole.
  – Some of the benefits are Risk Management, contingencies and a culture of success.
What is Knowledge Transfer

Knowledge Transfer is a systematic and purposeful strategy for capturing critical knowledge from key personnel to store and share within an organization for maximum efficiency.
What is Knowledge Transfer

Maximum efficiency for your team could mean:

– Supporting a current employee as they transition into a new role
– Shorter ramp-up times for new hires or interns
– Ensuring tribal knowledge from retiring employees is preserved
What is Knowledge Transfer

• What is **Tribal Knowledge**?
  – A set of unwritten rules or information known by a group of individuals within an organization, but not common to others, that often contributes significantly to overall quality.
  – Tribal Knowledge may be essential to the production of a product or performance of an action, but may also be counterintuitive to the process.

• So how do we transfer that **Tribal Knowledge**?
What is Knowledge Transfer

From Tribal to Explicit Knowledge

My total knowledge

What I can tell or show

Storytelling, “Show and Tell”

What I can write, record or document

Manualization, Documentation

What I can transfer to readers or watchers-listeners of my actions or recordings
What is Knowledge Transfer

Who is the “go-to” person in your organization when there are questions?

Identify key positions and people where potential knowledge loss is most imminent

Assess how critical the knowledge loss will be and how much of it needs to be captured

Develop a plan of action to ensure the capture of that critical knowledge and a plan of action to transfer it
How Adults Learn

- **Visual learners** learn best by seeing. Include graphics, colorful material, and charts for planning their projects.

- **Auditory learners** learn best by hearing. Include interactive discussions, team exercises, and team discussions as they run simulations and presentations.

- **Kinesthetic learners** learn by doing. Include practical exercises where they can touch or manipulate what you want them to learn.
How Will Knowledge Transfer Reduce Errors?

• Changes the perspective and the message of an organization to allow more positive feedback from all personnel
• Allows the organization to move from reactive responses to proactive responses.
• Creates EFFECTIVE lessons learned processes
• Allows use of in-house experts in determining root cause analysis
• Encourages a climate of revealing errors as opposed to hiding them
Critical Tasks

Step 1 – Identify Critical Tasks and Activities

List the tasks and activities below, using as many blanks as necessary.

1. ______________________________________________________________
2. ______________________________________________________________
3. ______________________________________________________________
4. ______________________________________________________________
5. ______________________________________________________________
6. ______________________________________________________________
7. ______________________________________________________________
8. ______________________________________________________________
9. ______________________________________________________________
10. _____________________________________________________________
Step 2 – Define each task and activity

<table>
<thead>
<tr>
<th>Task or Activity from step #1:</th>
</tr>
</thead>
<tbody>
<tr>
<td>List the critical knowledge, experience, or skills needed for this task:</td>
</tr>
</tbody>
</table>
Questions

Robert Eubank, RC Trainer
Peak Reliability
reubank@peakrc.com
office: 360-448-2502

WECC Human Performance
Knowledge Transfer Task Force
Kyle Conroy, Chair
conroy@wapa.gov
Norm Szczepanski, Vice Chair
norman.szczepanski@smud.org
Discoveries, Conclusions, Outcomes

• Once upon a time, there was an overcurrent relay......
• Personnel may be resistant at first:
  – Need to know how it will benefit them
  – That management will use their input
• Change can only occur with full support of management.