

Managing Talent Risk Through Knowledge Transfer

METHODICAL, MEASURABLE, AND CLEAR

Ever struggled with ...

- Retiring workers with unique knowledge
- Onboarding the next generation
- Lack of role clarity after a reorganization
- Lack of role clarity between departments
- Transitioning from legacy to new systems
- Consistency in your distributed workforce
- What else?


Talent Risk Management

A hand in a dark suit sleeve points towards the right side of the frame. The background is a dark green world map with a network of glowing yellow nodes and thin white lines connecting them, suggesting global connectivity and data flow.


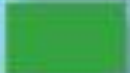
Do you have the right
people with the right skills
to execute your strategy
1-3 years from now?

Team A	Silo A	Silo B	Silo C	Silo D	Silo E	Silo F
Team Member 1						
Team Member 2						
Team Member 3						
Team Member 4						
Team Member 5						
Team Member 6						
Team Member 7						
Team Member 8						
Team Member 9						
Team Member 10						

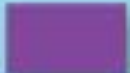
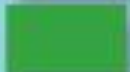


	Silo A	Silo B	Silo C	Silo D	Silo E	Silo F
Team A						
Team Member 1						
Team Member 2		Expert to be Replicated	Expert to be Replicated	Expert to be Replicated	Expert to be Replicated	Expert to be Replicated
Team Member 3						
Team Member 4						
Team Member 5						
Team Member 6		Expert to be Replicated			Expert to be Replicated	Expert to be Replicated
Team Member 7						Expert to be Replicated
Team Member 8						
Team Member 9						
Team Member 10						Expert to be Replicated

 Expert to be Replicated

Team A	Silo A	Silo B	Silo C	Silo D	Silo E	Silo F
Team Member 1		Consistent with Expert	Consistent with Expert		Consistent with Expert	
Team Member 2		Expert to be Replicated	Expert to be Replicated	Expert to be Replicated	Expert to be Replicated	Expert to be Replicated
Team Member 3		Consistent with Expert	Consistent with Expert			
Team Member 4		Consistent with Expert				
Team Member 5					Consistent with Expert	
Team Member 6	Consistent with Expert	Expert to be Replicated			Expert to be Replicated	Expert to be Replicated
Team Member 7		Consistent with Expert	Consistent with Expert		Consistent with Expert	Expert to be Replicated
Team Member 8						
Team Member 9		Consistent with Expert	Consistent with Expert		Consistent with Expert	Consistent with Expert
Team Member 10		Consistent with Expert	Consistent with Expert		Consistent with Expert	Expert to be Replicated

 Expert to be Replicated
 Consistent with Expert

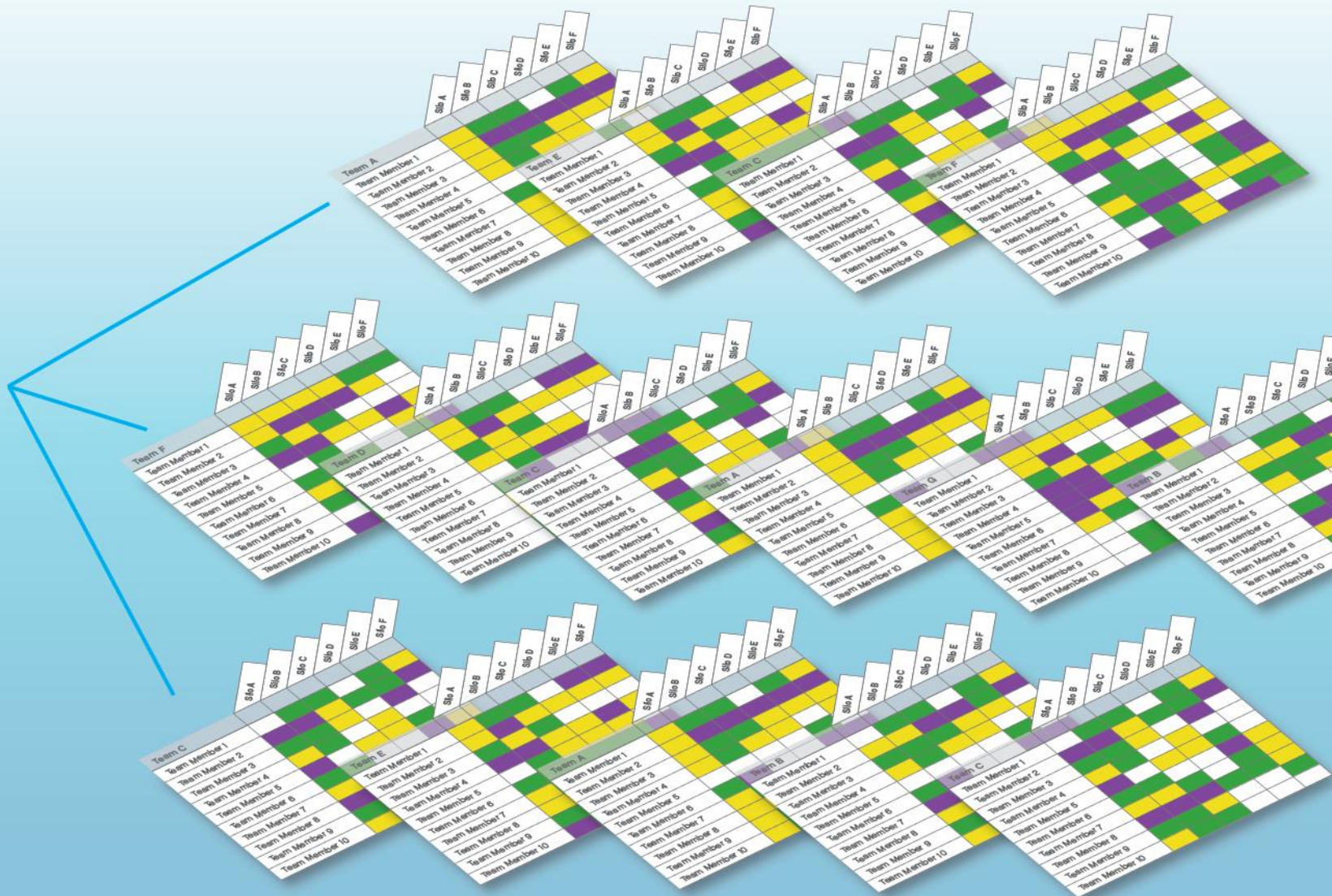
Team A	Silo A	Silo B	Silo C	Silo D	Silo E	Silo F
Team Member 1	Actively Learning	Consistent with Expert	Consistent with Expert	Not Working in that Silo	Consistent with Expert	Actively Learning
Team Member 2	Actively Learning	Expert to be Replicated	Expert to be Replicated	Expert to be Replicated	Expert to be Replicated	Expert to be Replicated
Team Member 3	Actively Learning	Consistent with Expert	Consistent with Expert	Actively Learning	Actively Learning	Actively Learning
Team Member 4	Actively Learning	Consistent with Expert	Actively Learning	Actively Learning	Not Working in that Silo	Actively Learning
Team Member 5	Not Working in that Silo	Not Working in that Silo	Not Working in that Silo	Not Working in that Silo	Consistent with Expert	Not Working in that Silo
Team Member 6	Consistent with Expert	Expert to be Replicated	Not Working in that Silo	Not Working in that Silo	Expert to be Replicated	Expert to be Replicated
Team Member 7	Actively Learning	Consistent with Expert	Consistent with Expert	Not Working in that Silo	Consistent with Expert	Expert to be Replicated
Team Member 8	Actively Learning	Actively Learning	Actively Learning	Actively Learning	Actively Learning	Actively Learning
Team Member 9	Actively Learning	Consistent with Expert	Consistent with Expert	Not Working in that Silo	Consistent with Expert	Consistent with Expert
Team Member 10	Actively Learning	Consistent with Expert	Consistent with Expert	Not Working in that Silo	Consistent with Expert	Expert to be Replicated

-  Expert to be Replicated
-  Consistent with Expert
-  Actively Learning
-  Not Working in that Silo

Team A	Silo A	Silo B	Silo C	Silo D	Silo E	Silo F
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Team Member 4	Actively Learning	Consistent with Expert	Actively Learning	Actively Learning	Not Working in that Silo	Actively Learning
Team Member 5	Not Working in that Silo	Not Working in that Silo	Not Working in that Silo	Not Working in that Silo	Consistent with Expert	Not Working in that Silo
Team Member 6	Consistent with Expert	Expert to be Replicated	Not Working in that Silo	Not Working in that Silo	Expert to be Replicated	Expert to be Replicated
Team Member 7	Actively Learning	Consistent with Expert	Consistent with Expert	Not Working in that Silo	Consistent with Expert	Expert to be Replicated
Team Member 8	Actively Learning	Actively Learning	Actively Learning	Actively Learning	Actively Learning	Actively Learning
Team Member 9	Actively Learning	Consistent with Expert	Consistent with Expert	Not Working in that Silo	Consistent with Expert	Consistent with Expert
Team Member 10	Actively Learning	Consistent with Expert	Consistent with Expert	Not Working in that Silo	Consistent with Expert	Expert to be Replicated

-  Expert to be Replicated
-  Consistent with Expert
-  Actively Learning
-  Not Working in that Silo
-  Risk

DIVISIONS



Big Picture

- 1) In order of priority, who are the stakeholders we serve?
- 2) What are the services we currently provide?
- 3) With whom (and in what priority) do we partner in delivering our services?
- 4) How do we currently measure our success?
- 5) What is the relevant history that affects current strategy?
- 6) Which external trends or issues (such as market, economic, societal, political, or environmental factors) are important to our strategy?
- 7) How does our organizational structure support our strategy, and how does our team fit into it?
- 8) What are three things our unit is doing to support the strategy?

Methodically replicating the expertise, wisdom and tacit knowledge of critical, “chosen” professionals in the heads and hands of their co-workers.

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Team Member 4	Actively Learning	Consistent with Expert	Actively Learning	Actively Learning	Not Working in that Silo	Actively Learning
Team Member 5	Not Working in that Silo	Not Working in that Silo	Not Working in that Silo	Not Working in that Silo	Consistent with Expert	Not Working in that Silo
Team Member 6	Consistent with Expert	Expert to be Replicated	Not Working in that Silo	Not Working in that Silo	Expert to be Replicated	Expert to be Replicated
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Team Member 10	Actively Learning	Consistent with Expert	Consistent with Expert	Not Working in that Silo	Consistent with Expert	Expert to be Replicated

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-  Consistent with Expert
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Skill Development Plan (SDP)

Skill	Sequence	Test Questions	Date	Resources
Write a...	1	1, 2, 3, 5	5/10	specific document at location...
Design a...	2	1, 2, 3, 8	5/17	formal training date
Build a relationship with...	3	3, 4, 7, 8, 14	5/19	name of mentor
Lead...meeting	4	1, 2, 9	5/25	specific template
Troubleshoot...	5	2, 5, 7, 14, 20	5/25	samples at location...

Effective Knowledge Transfer

- Right expert is transferring the right knowledge
- Apprentice is clear and in the driver's seat
- Customizable for various backgrounds and needs
- Measurable so everyone knows success
- Date-driven including time carved out to hit the date
- Supported with guidance on how to execute

Questions?