Managing Talent Risk Through Knowledge Transfer

METHODICAL, MEASURABLE, AND CLEAR

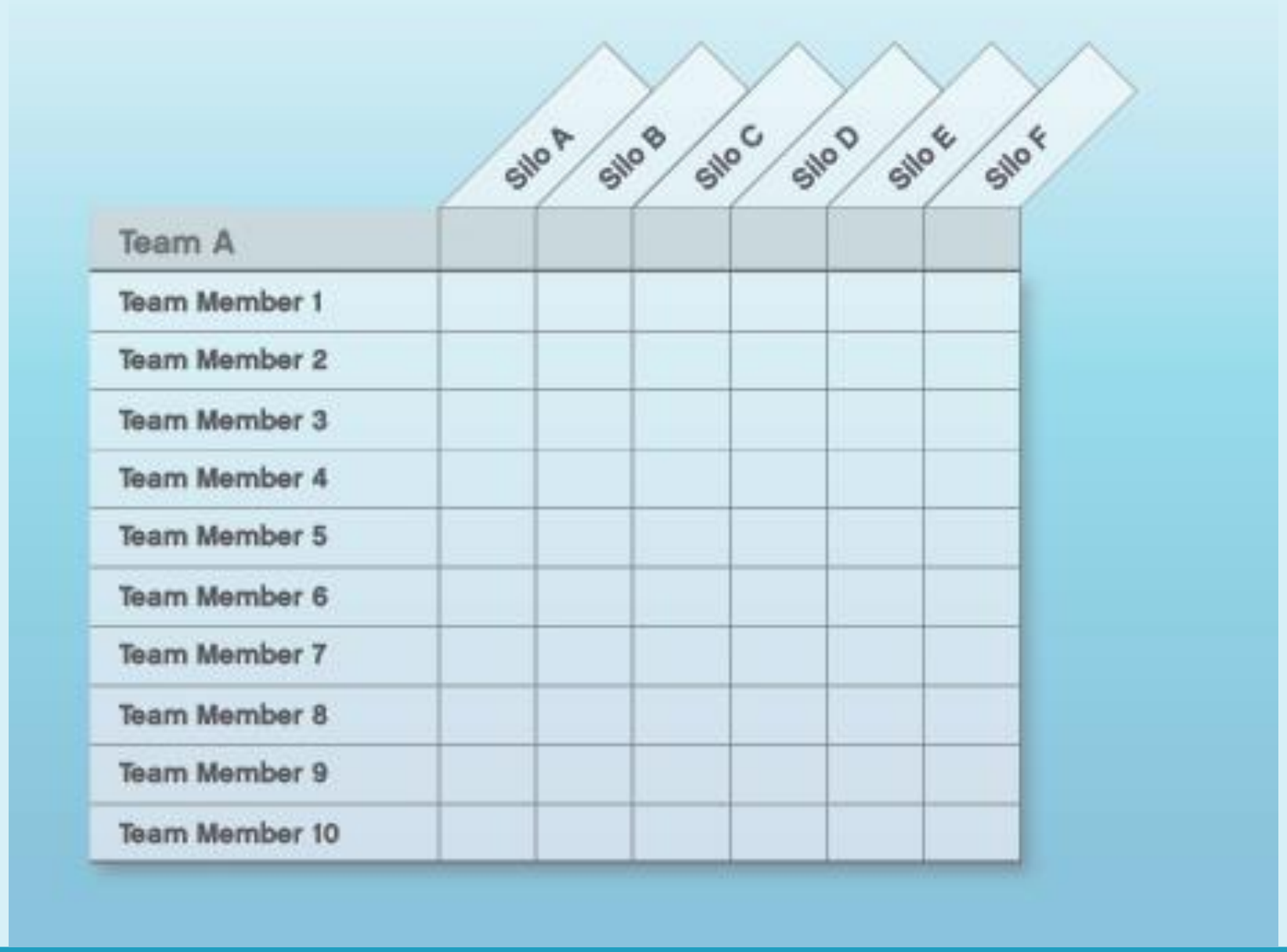
The Steve Trautman Co.
Talent Risk & Knowledge Transfer Experts

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

Do you have the right
people with the right skills
to execute your strategy
1-3 years from now?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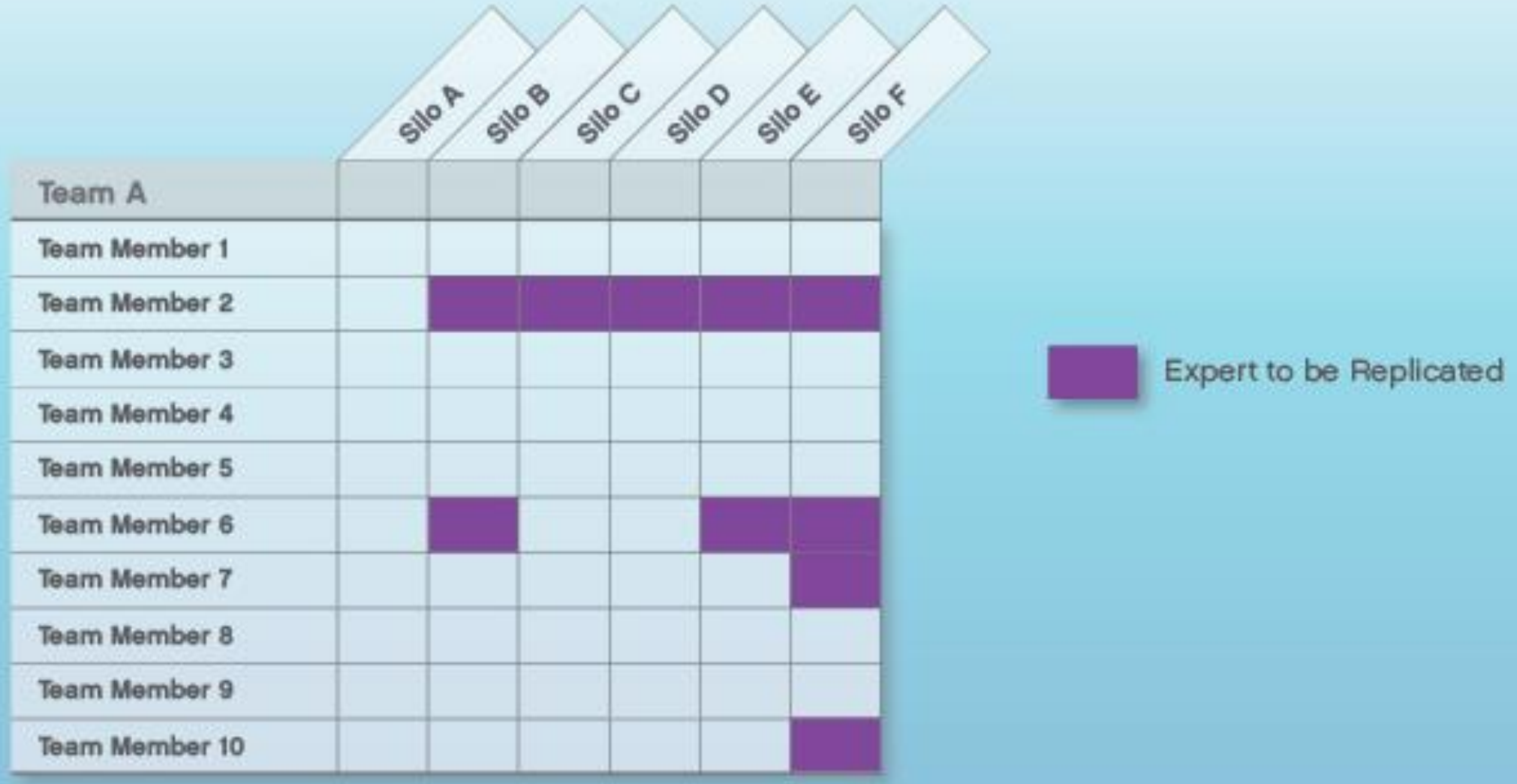
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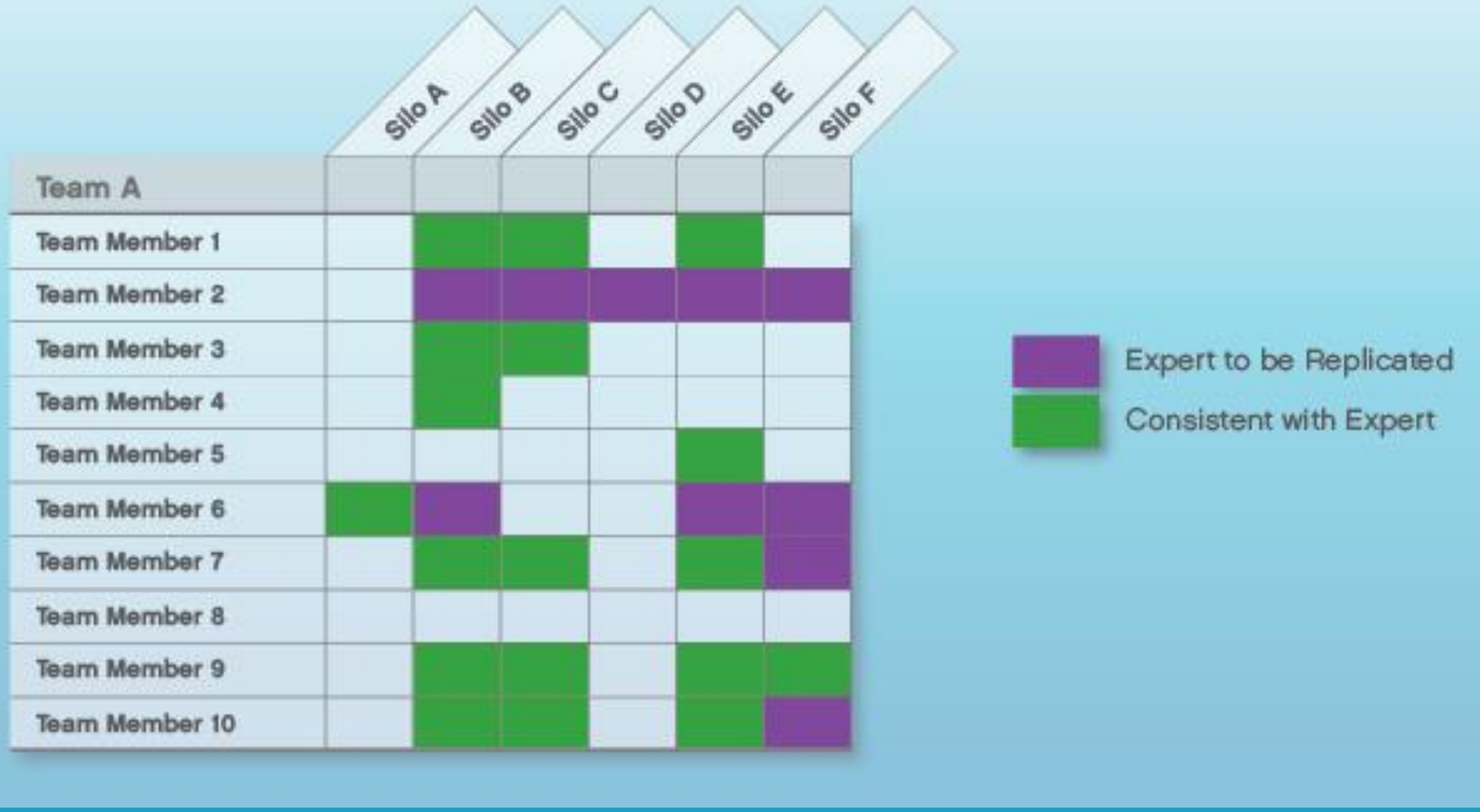
Expert to be Replicated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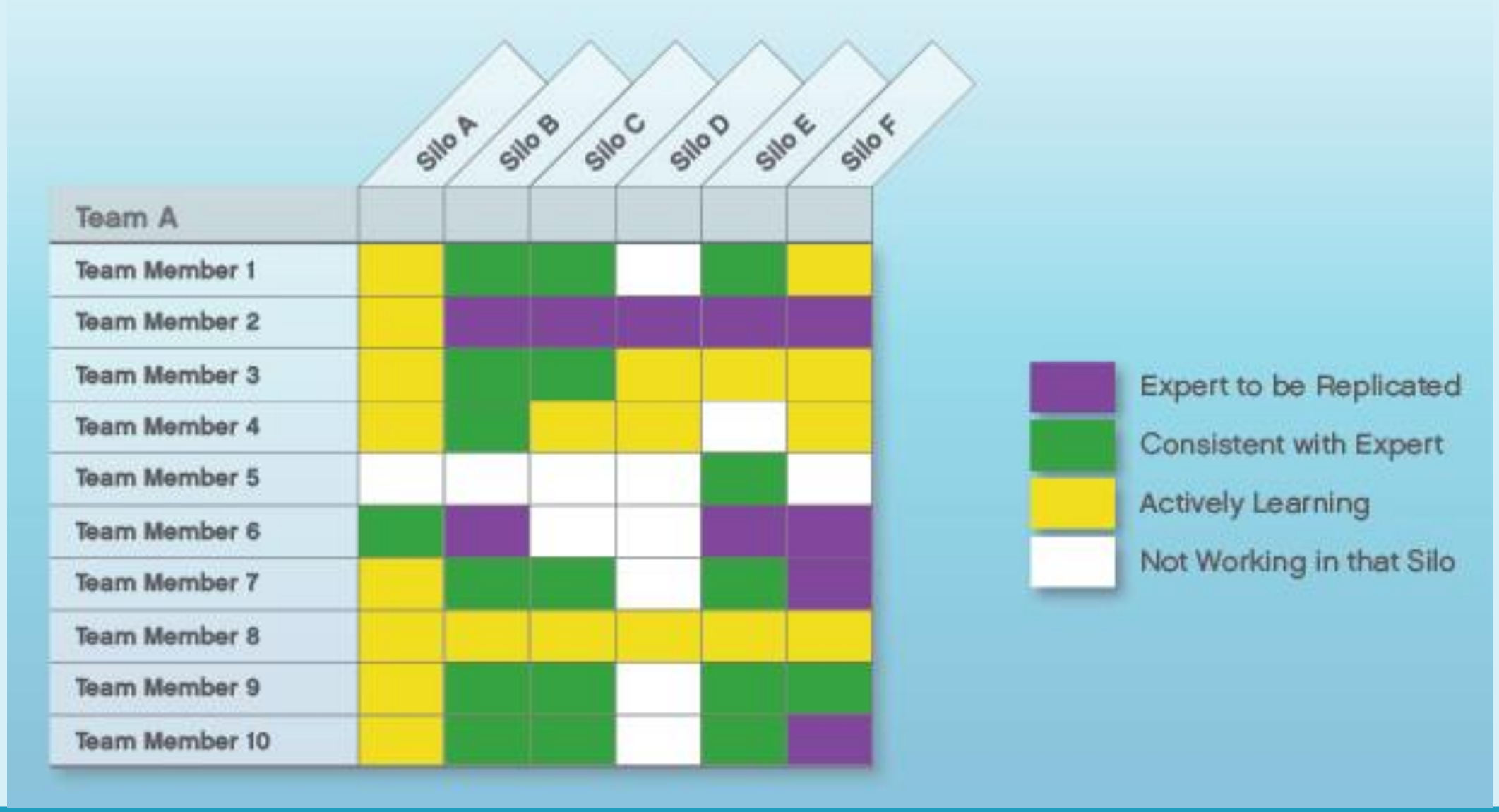
Consistent with Expert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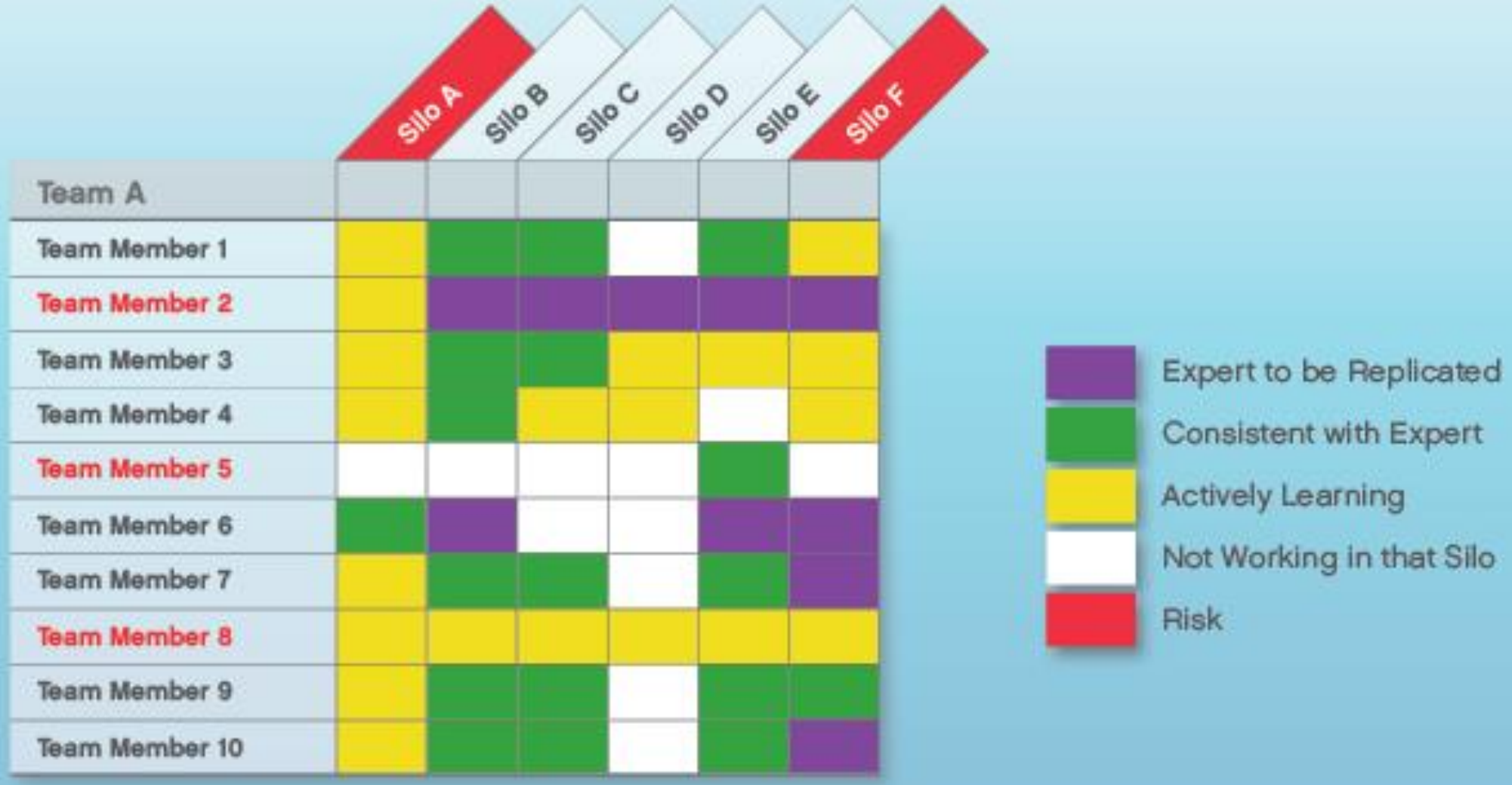
Expert to be Replicated
Consistent with Expert
Actively Learning
Not Working in that Silo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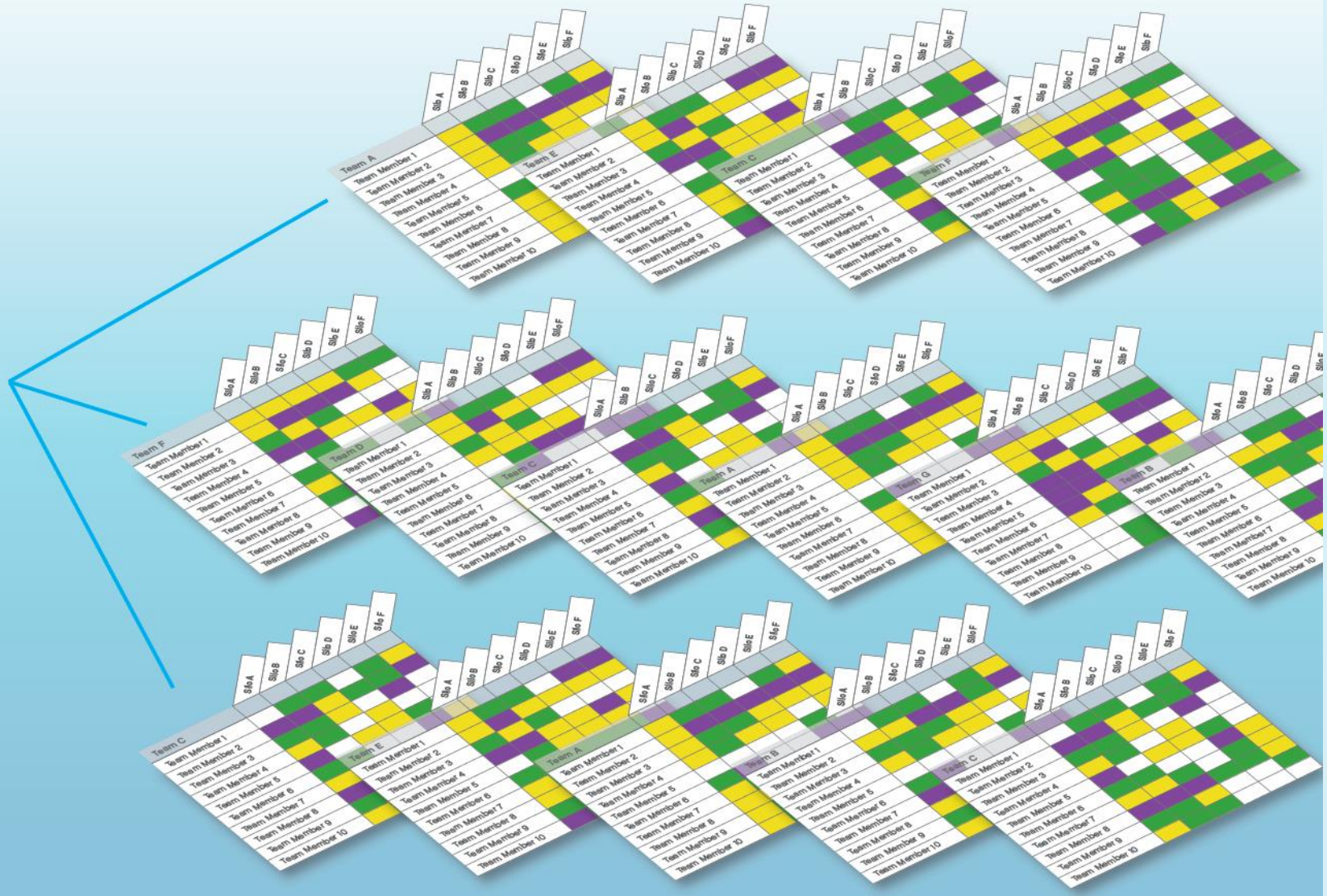
Risk

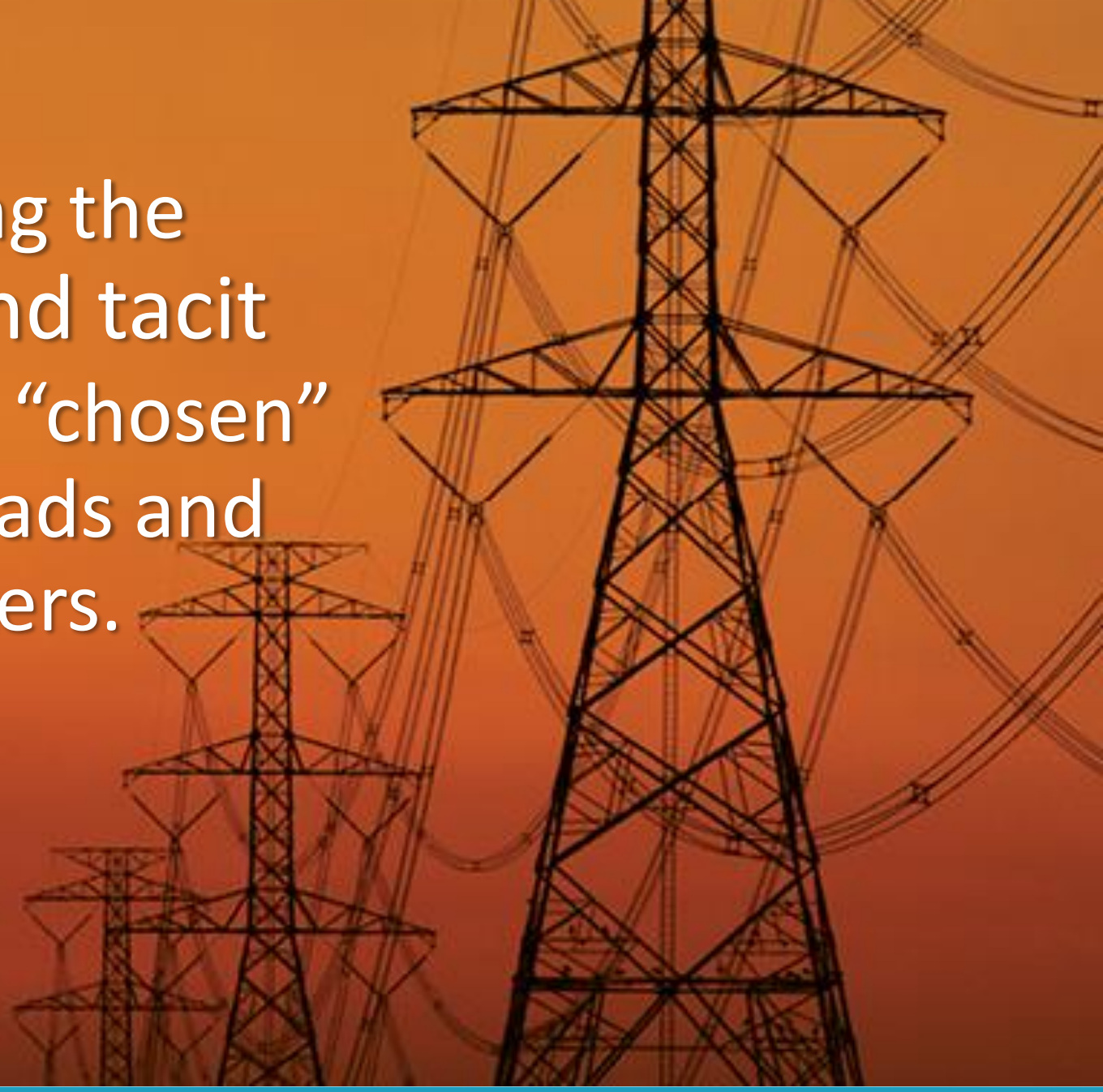
DIVISIONS

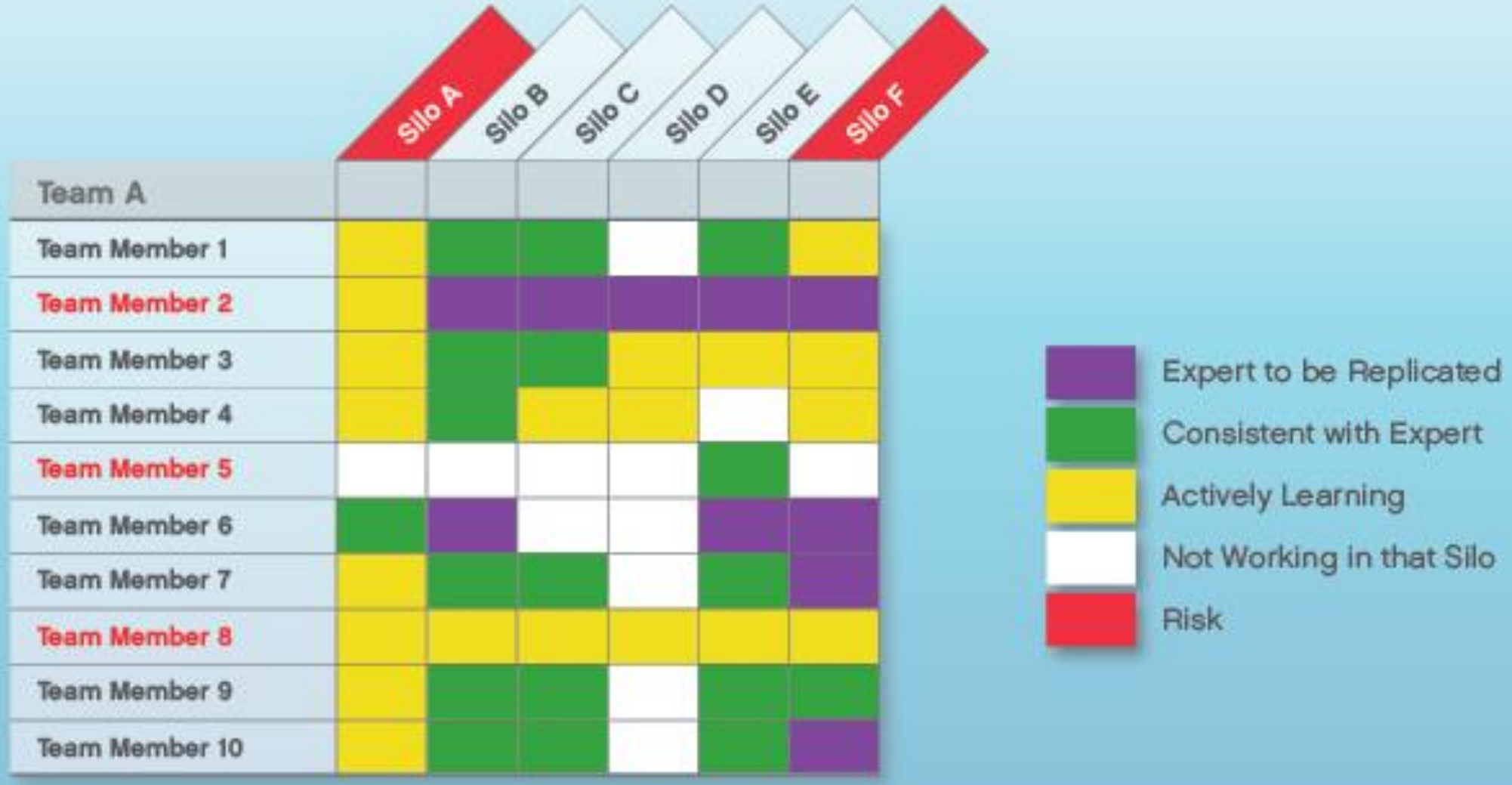


Big Picture

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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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?