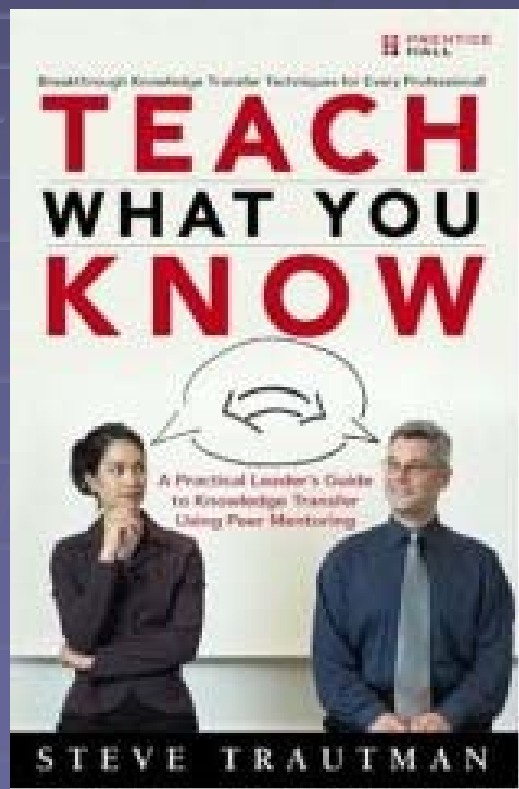# Supporting Change with Knowledge Transfer Skills

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Solution Strategies

www.peermentoring.com

Objectives

- Spot changes happening in your org
- Identify what needs to be known
- Identify those who know
- Identify those who need to know
- Plan to move the information efficiently – the knowledge transfer *machine*

Business Metrics

- Reduce ramp up to productivity
- Reduce turn-over from burnout
- Develop a known pipeline of next generation leaders/managers
- Reduce rework stemming from lack of skills
- Improve morale because communication is better and expectations are clear

Changes You Face

- Onboarding new employees
- Recovering from reorganizations
- Kicking off new projects and adding resources to existing projects
- Mergers and Acquisitions
- Introducing new technologies, systems or standards
- Retiring workers with singular knowledge
- Cross-training to improve flexibility in the face of business changes
- New markets and customers
- New products

What must be known?

- Skills
- Processes
- Standards
- Tools
- Templates
- Policies
- Success Metrics
- Requirements

- History
- Tribal knowledge
- Collaborative team issues
- Customer issues
- Culture
- Communication strategies

Who knows?

- Executives
- Managers
- Supervisors
- Leads
- Training Dept
- Key employees
  - "Primary" Mentors
  - "Silo" Mentors

Primary Peer Mentors

- Takes on a new <u>person</u> from "soup to nuts"
  - New to company
  - New to group
  - New to project
- No authority
- Usually in same or similar role
- Help them navigate the onboarding process
- Training/proving ground for future managers
- Measures knowledge of general skills

Helps with these Changes

- **Onboarding new employees**
- **Recovering from reorganizations**
- **Kicking off new projects and adding resources to existing projects**
- **Mergers and Acquisitions**
- Introducing new technologies, systems or standards
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Silo Peer Mentors

- Takes on a specific <u>topic</u> specialty
- Shares the onboarding role but in a specialized way
- Serves as the go-to person and trains many people (new or existing) on the topic
- Improves consistency by being central
- Better for those with less mgmt interest/instinct/potential
- Measures knowledge of a specific skill

Helps with these Changes

- Onboarding new employees
- Recovering from reorganizations
- Kicking off new projects and adding resources to existing projects
- Mergers and Acquisitions
- **Introducing new technologies, systems or standards**
- **Retiring workers with singular knowledge**
- **Cross-training to improve flexibility in the face of business changes**
- **New markets and customers**
- **New products**

You already have Peer Mentors

- Take a few minutes to write down the names of the primary and silo mentors you already rely on.
- For the silo mentors, note their specialties, i.e.
    - Security
    - Coding standards
    - Build process
    - Tool usage/maintenance
    - Debugging/Problem Solving
    - How to…
    - Knowledge of a customer

You already have Apprentices

- Take a few minutes to note the people who need to learn from your list of peer mentors
  - New employee, vendor, temp, or intern
  - Existing employee - new to the **team or project**
  - Existing employee - new to the **skill (cross train)**
  - Someone on another (collaborative) team
  - Customer/client
  - Leader/Manager

Define Roles

- How do your primary mentors know what is expected?

- Are the silo mentors formally identified and their roles established (i.e. active vs. reactive)

- What is the difference between the manager role and the mentor role?

Ensure Predictable Transfer

1. Assign a primary or silo mentor
2. Conduct a first meeting (mgr, mentor, apprentice) to set expectations
3. Provide "air, food and water" checklist
4. Explain the big picture
5. Customize a measurable training plan

Identify "Air, Food and Water"

- Workstation set up with *current* tools
- Email, voicemail up and running
- *Current* documentation
- Permissions/Security
- Resources (i.e. mentor, admin, help desk)
- Introduction to *core* team
- Added to team meetings and distribution lists

Explain the "Big Picture"

- What is your team's mission or purpose?
- How do you fit in the larger organization's mission?
- Who are our customers and are they all the equally important?
- Who are our competitors?
- What are your specific products or services?
- How is your team's success measured?
- Where are we in the product or service cycle?
- How does the work flow?

Make up Training Plans

- Deconstruct each job or specialty into a series of skills that can be taught. For example:
  - Write a standard test plan
  - Run the compiler
  - Post a bug
  - Lead a kickoff meeting
- Decide how to measure (test) if the skill is "known"
  - Explain the steps in the process and why each is important
  - Explain the 3 most common mistakes and how to avoid them.
- Provide a list of resources to help pass the test.
  - Formal training
  - Current documentation
  - Silo Mentors
  - Examples

The Five Minute Meeting Plan Agenda

1. Explain meeting purpose

2. Explain relationship to job

3. Outline main points

4. Note jargon

5. Identify practice opportunities

6. List other resources

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Examples

- Intel onboarding a team in Shanghai
- Boeing rehiring 737 mfg employees
- Microsoft ensuring every intern is mentored
- Electronic Arts grows studio by over 700 people (60%) in 2 years
- Nike on-boards sales and customer service employees
- Class Software trains entire company so they're ready to grow.

For More Info

- Next class at Construx is October 12th.
- "Teach What You Know"