Unlocking the Value of Knowledge
Meeting CEO Priorities of the 21st Century

Jeff Stemke
Brazil Global Make Conference 2012

Topics

- What Your CEO Cares About

- Business Case for Knowledge Transfer

- Jump-start your Knowledge Strategy at KM 3.0

- Integrating Knowledge Transfer Into Your Operations

- Building a Knowledge-Sharing Culture

Top CEO Priorities

Manage Talent

Business Growth
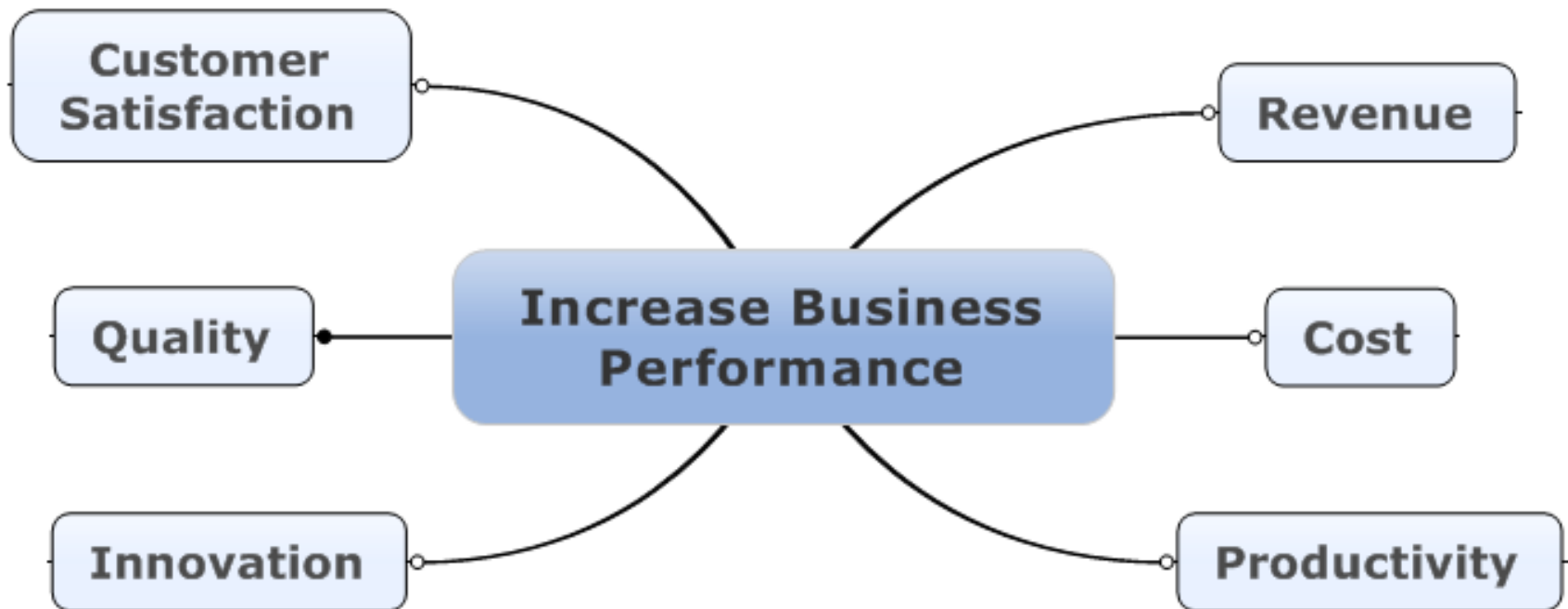
Optimize Costs

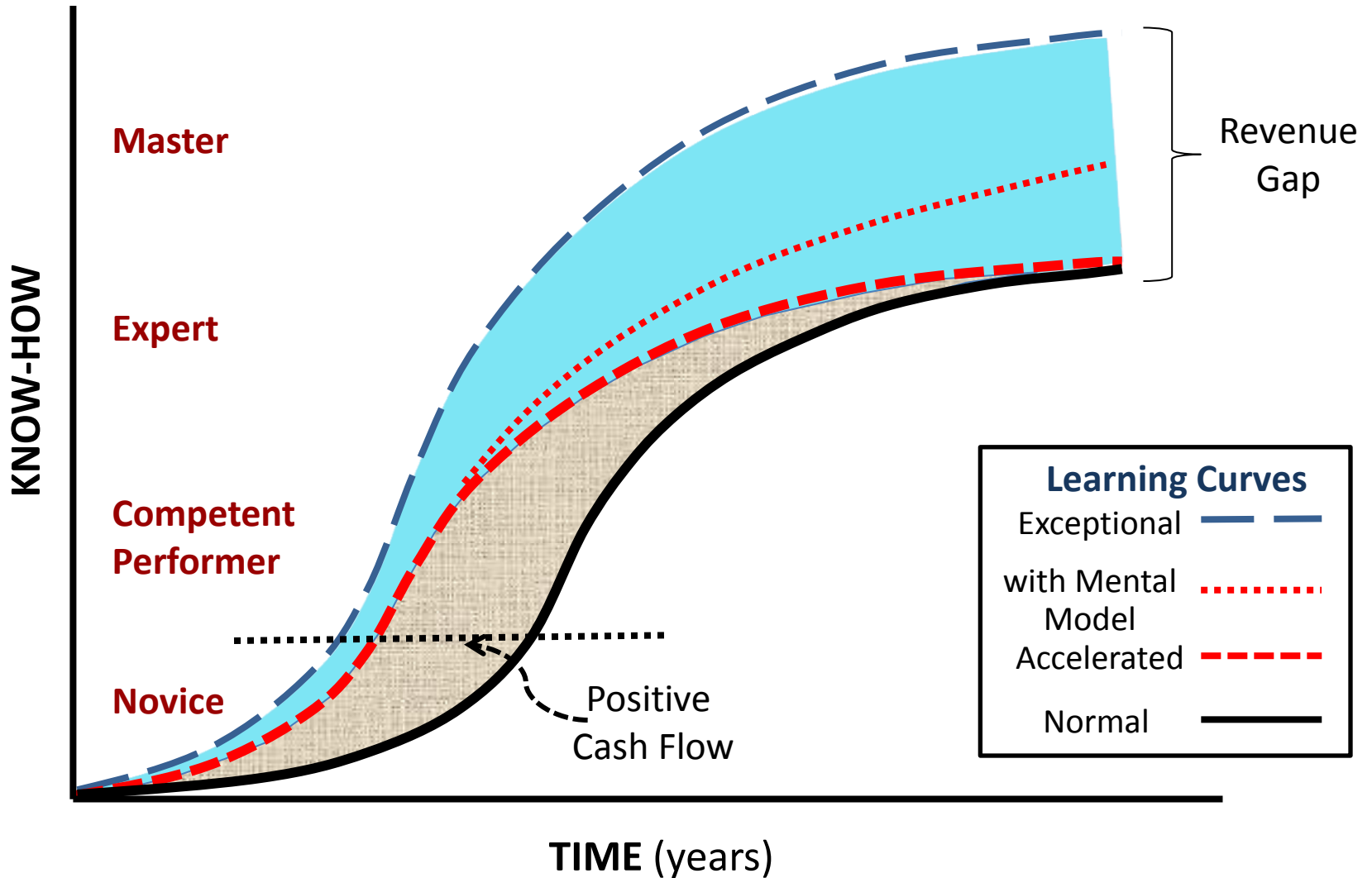**Manage Risks**

Innovation

Operate Sustainably

CEO SURVEYS
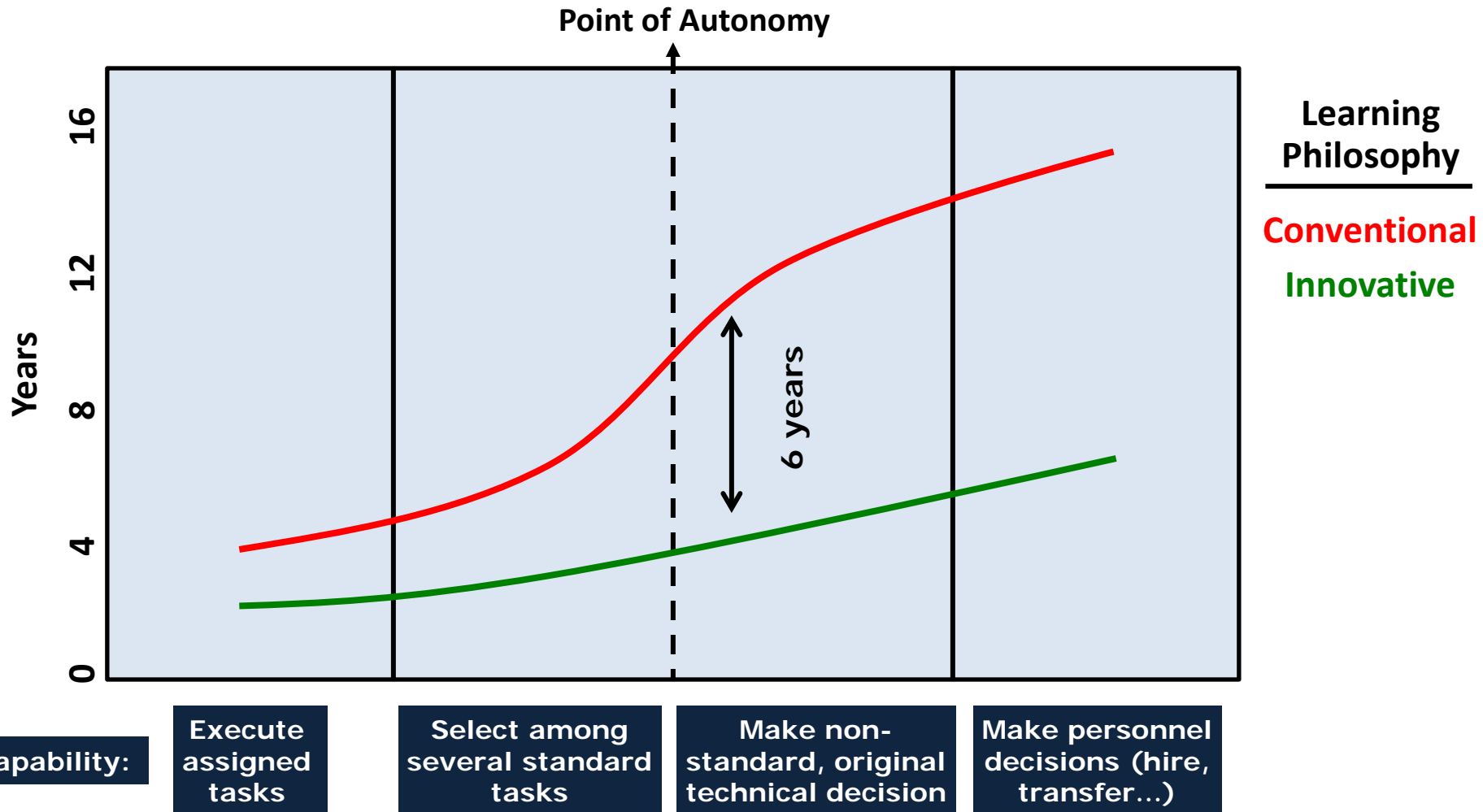Conference Board, PwC, APQC

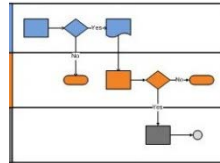# Achieving Measurable Results

Knowledge and Experience

Value of Knowledge

Impact of Accelerating Competency

Point of Autonomy

Years

16

12

8

4

0

6 years

Learning Philosophy

Conventional

Innovative

Capability:

| Execute assigned tasks | Select among several standard tasks | Make non-standard, original technical decision | Make personnel decisions (hire, transfer...) |

Source: Schlumberger, SPC 2006 Benchmark Survey, 20 companies

Chevron's KM Journey

Focus on Quality

Work Processes

Mergers

Knowledge Transition

A Few $$$　　　　　**Many $**　　**New $$$**　　**Lost $$**

Lotus Notes　　　　**Internet**　　**Web 2.0**　　**SharePoint**

KM 1.0　　　　　　**KM 2.0**　　　　　　**KM 3.0**

| 1990 | 1995 | 2000 | 2005 | 2010 |

Value of Knowledge Transfer
Chevron Success Stories

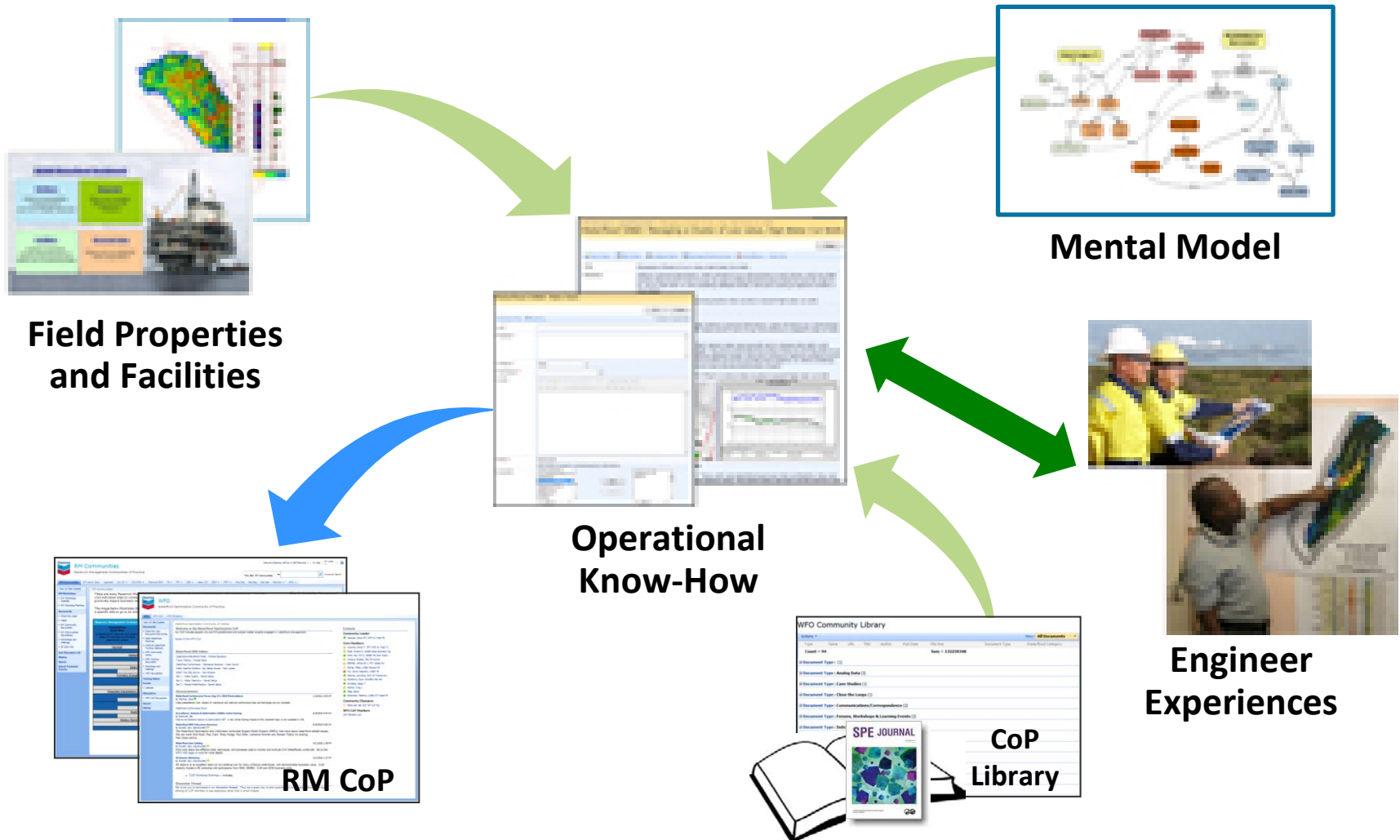| RESULT	OPPORTUNITY
ROI > 10x	Refining best practice teams
15% savings	Savings in capital projects
$100 million	Cost savings – Refining Q&A
$1 billion	Energy efficiency savings
World-class performance	Safety & environment
Strategic workforce	Ability to meet business growth plans

Knowledge Embedded in Everyday Work
Learning and Performance Support

Field Properties and Facilities

Mental Model

Operational Know-How

Engineer Experiences

RM CoP

CoP Library

KM Strategy Focus Areas

Access Data, Information and Expertise	Grow Knowledge Assets	Facilitate Collaboration and Learning	Develop a Knowledge-Sharing Culture	Measure Results
• Tools to connect to experts who can quickly offer advice. • Processes and repositories to share and reuse best practices, templates and documentation.	• Processes and tools to capture and transfer knowledge to accelerate competency and increase business performance.	• Communities of Practice offer social learning as members help each other solve problems, document practices, form relationships and innovate.	• Identify role expectations for knowledge transfer • Establish management accountability to reinforce sharing and reuse. • Reward and recognize results.	• Develop practical metrics that demonstrate business value. • Include in performance plans and scorecards.

Talent Management & Knowledge Transfer
Team Roles and Responsibilities

Business Managers
- Staff development
- Performance planning
- Business continuity
- Rewards and recognition

HR/L&D/Org Capability
- Workforce planning
- Career development
- Performance management
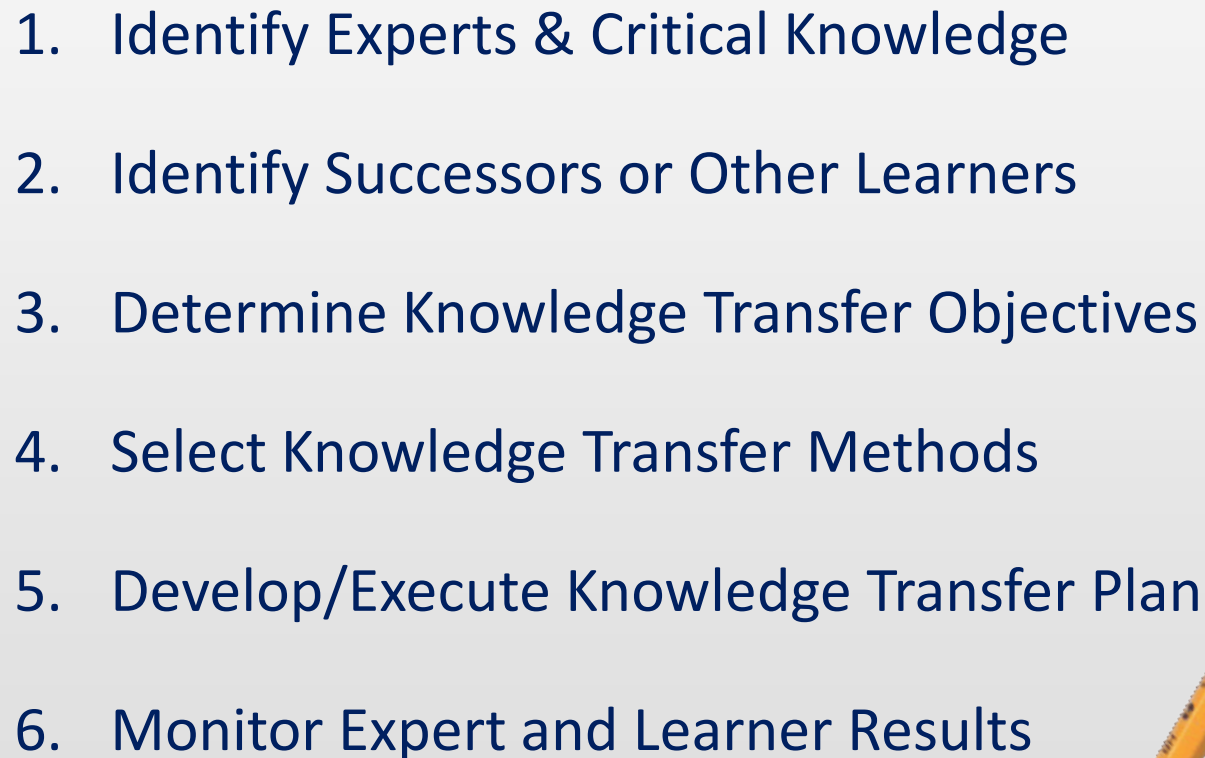- Succession planning
- Retention

KM
- Knowledge Handover
- Communities of practice
- Technical mentoring
- Knowledge elicitation
- Sharing behaviors

IT
- Blogs, Wikis, collaboration
- Knowledge repositories
- Expertise locator
- Workforce Analytics

Knowledge Transfer Game Plan

1. Identify Experts & Critical Knowledge

2. Identify Successors or Other Learners

3. Determine Knowledge Transfer Objectives

4. Select Knowledge Transfer Methods

5. Develop/Execute Knowledge Transfer Plan
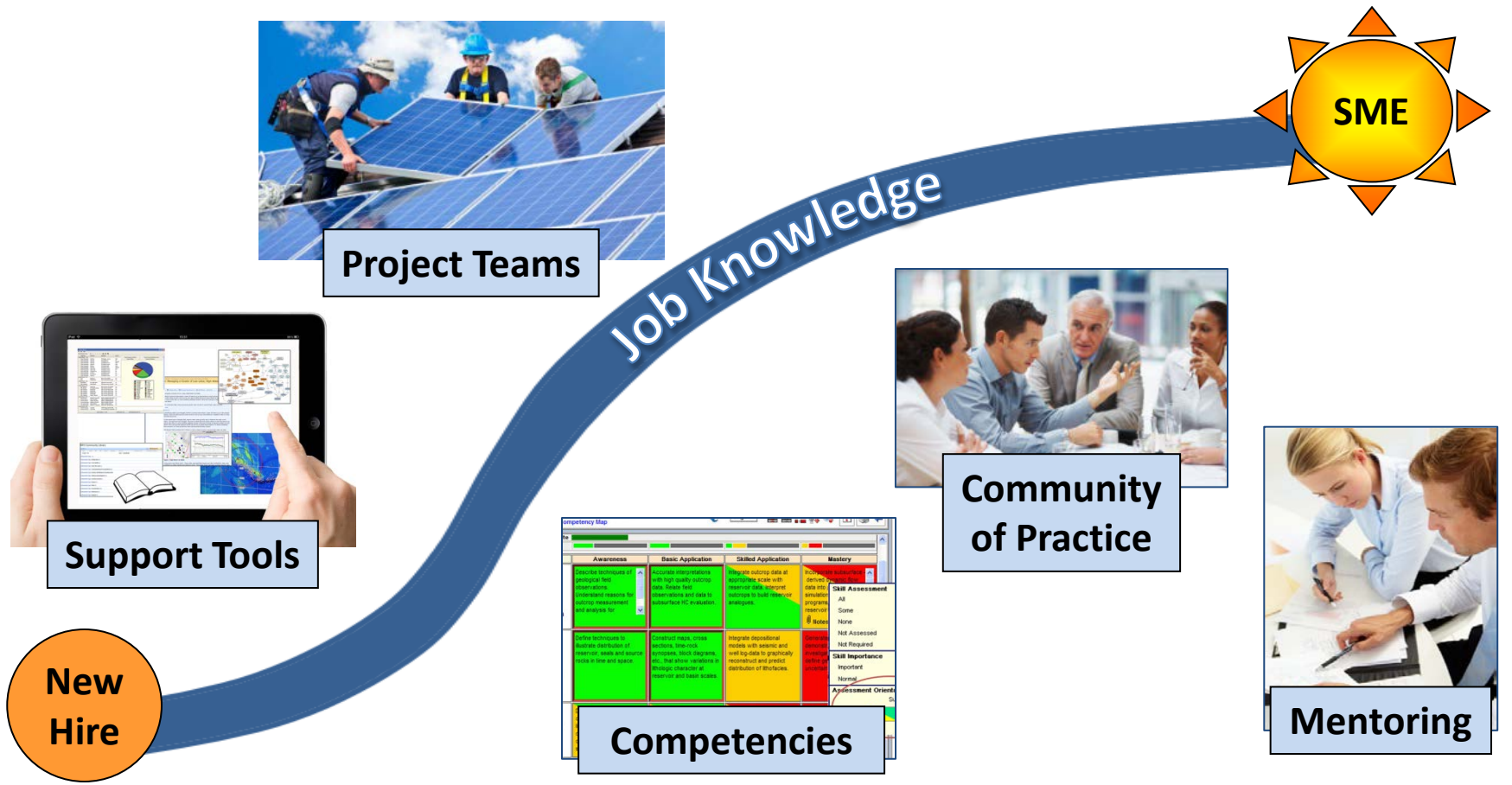
6. Monitor Expert and Learner Results

Example Knowledge Transfer Processes

- Asking Good Questions

- Knowledge Handover Checklist

- Community of Practice

- Job Shadowing

- Skills Mentoring

- Knowledge Coaching

- Guided Development Assignments

- Conversations with Experts

  - Knowledge Elicitation

  - Peer Assist

  - Team to Team

Learning Lifecycle

SME

Project Teams

Job Knowledge

Support Tools

Community of Practice

Mentoring

New Hire

Competencies

Performance Plans	←→	Succession Plans

| On-boarding | Training | ← Social Learning → Developing Others → |

Integrate Knowledge Transfer in HR Processes

HR / People Process	Adjustments for Knowledge Transfer
Performance Management	• Develop, assess and reward learning and knowledge sharing goals
360º Feedback	• Assess talent development accountability
Succession Planning	• Plan for functional <u>and</u> leadership succession • Assess and prioritize knowledge loss risks
Competencies	• Define skills and performance for critical jobs • Use social learning approaches • Provide experience-creating job assignments
Strategic Staffing	• Forecast knowledge needs and gaps • Develop knowledge transfer action plans
Employee Engagement	• Meaningful work with growth opportunity • Early career mentoring

Shaping Knowledge Sharing Behaviors

- **The Role of the Experienced Worker**
  - Look for opportunities to teach, coach and involve in special projects.
  - Introductions to customers, suppliers, consultants, user groups, etc.

- **The Role of Tomorrow's Workforce (Millennials)**
  - Ask questions. Ask to go along. Ask for details. Develop your network.
  - Seek out temporary assignments and cross-training opportunities.
  - Volunteer to write-up procedures with review by experienced employees.
  - Have a written development plan with specific skills, and experiences.

- **The Role of Managers**
  - Assume accountability for developing staff skills and expertise
  - Ensure development plans have specific learning objectives and metrics.
  - Provide tools for employees to share knowledge (e.g., blogs, wikis).
  - Provide time and recognize and reward learning, sharing and teaching.

Knowledge Transfer Lessons Learned

- Talent development takes time, but it can be accelerated.

- Not just about aging boomers. Managing complex operations and risk requires expertise at all levels.

- Everyone knows something; don't focus solely on "SMEs"

- Managers need to be accountable for developing staff

- Support behavior change management ("DCOM")

- There is no one-size-fits all solution

- Technology is only a part of a holistic solution.

- "Social Learning" is on-the-job collaboration and quick answers

- Senior staff are often interested in mentoring, but need recognition and reward.

- Relationships are a critical asset.

Questions? Key Takeaways?

To learn more, contact:
Jeff Stemke
Jeff@StemkeConsulting.com
www.TransferKnowHow.com