

**The expert is leaving –  
where does the knowledge remain?  
Leaving Expert Debriefings for systematic planning  
of most important knowledge transfer actions**

**Translation to English of major concepts in the presentation at  
Wissenstag Österreich 2007, «Sobald Wissen geht – was bleibt?»  
Hotel-Schloss Wilhelminenberg, Wien, 11. Juni 2007**

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Consulting for Knowledge and Innovation Management

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Networking | Information | Innovation | Intellectual Property | Standards & Regulation

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# Agenda

1

Knowledge has several dimensions,  
which need different ways of retention

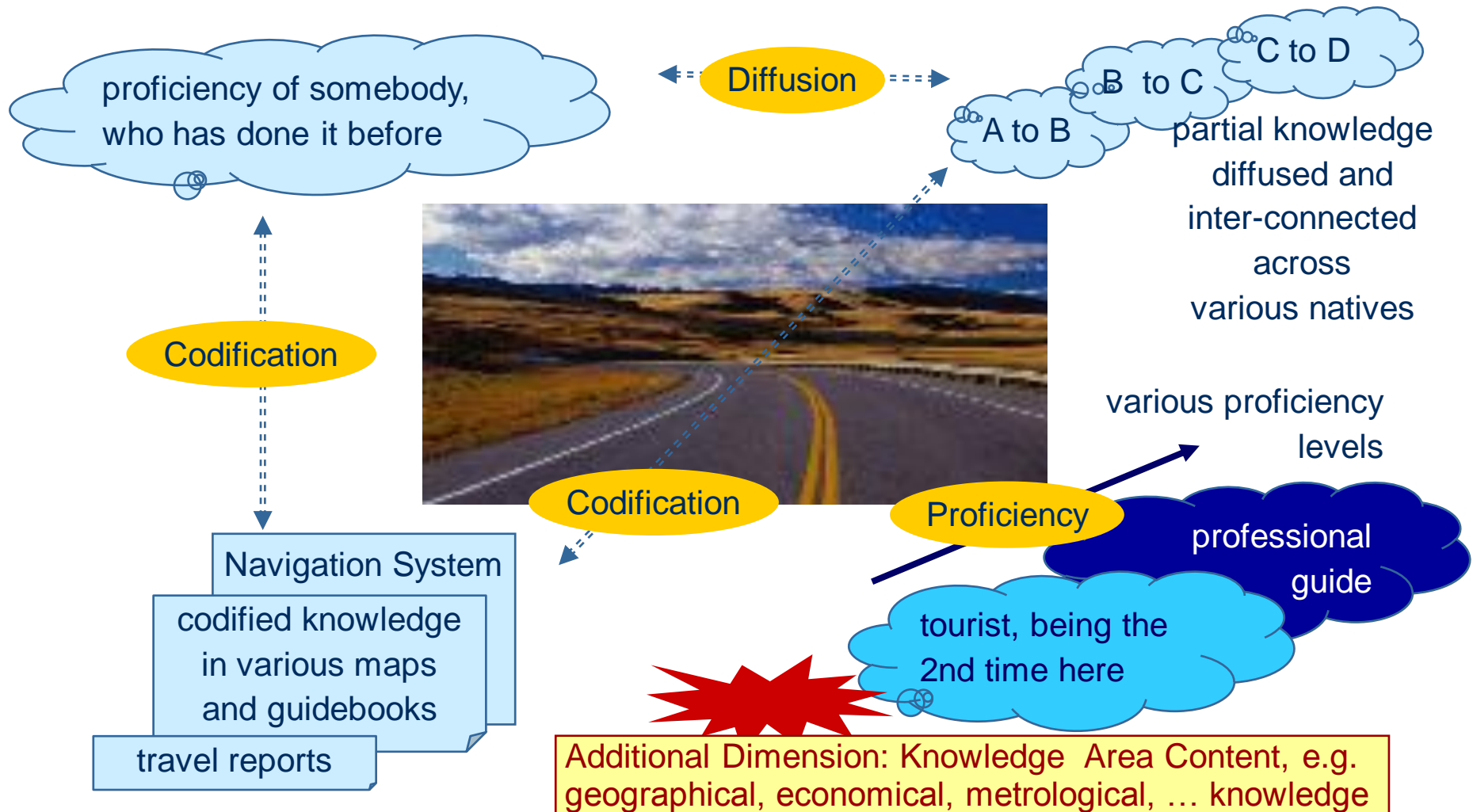
2

The Leaving Expert Debriefing process for systematic  
planning of most important knowledge transfer actions

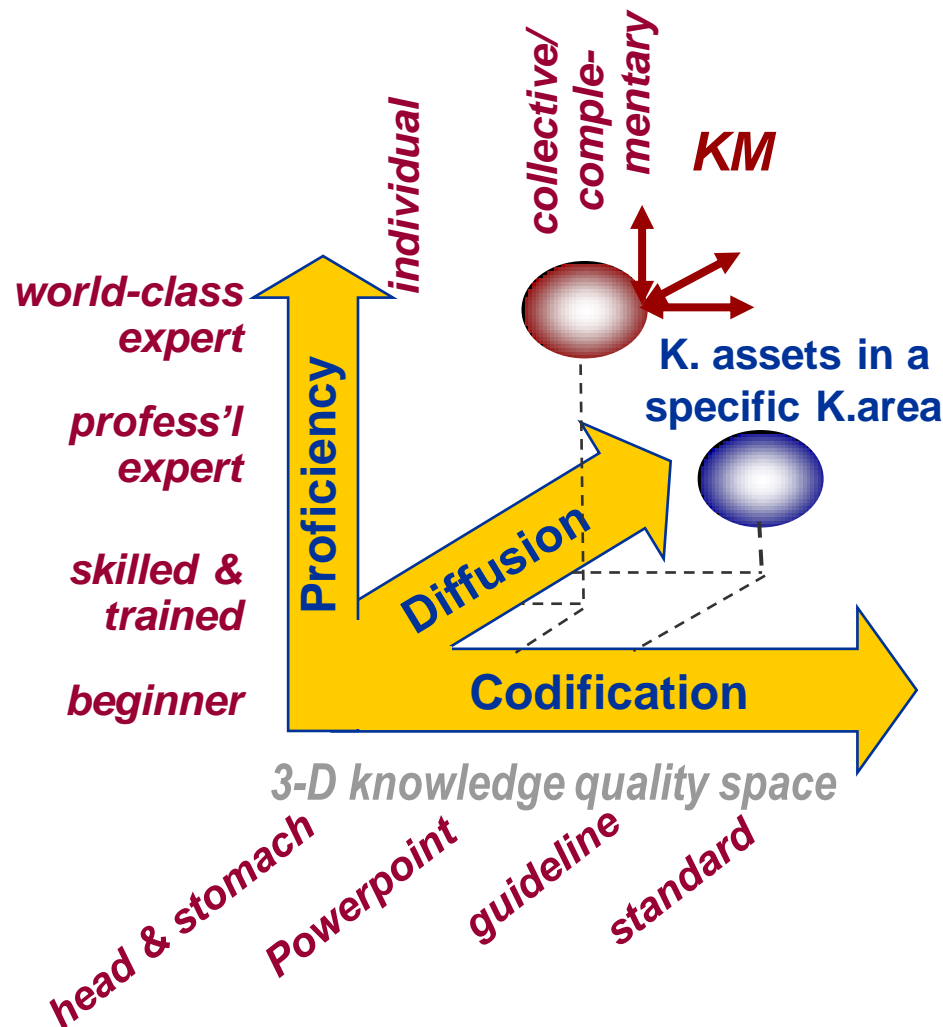
3

Examples and experiences, partly from KM consulting in  
Siemens AG

# Comprehensive understanding for „Knowledge“ – K Quality perspective – example: Knowledge to find the way from A to D



# Comprehensive Knowledge perspective: Major knowledge quality dimensions for any content



Proficiency or Depth of Knowledge: e.g. the level of expertise, ability and experience in individuals, e.g. ranging from apprentice to world-class expert level.

Diffusion:

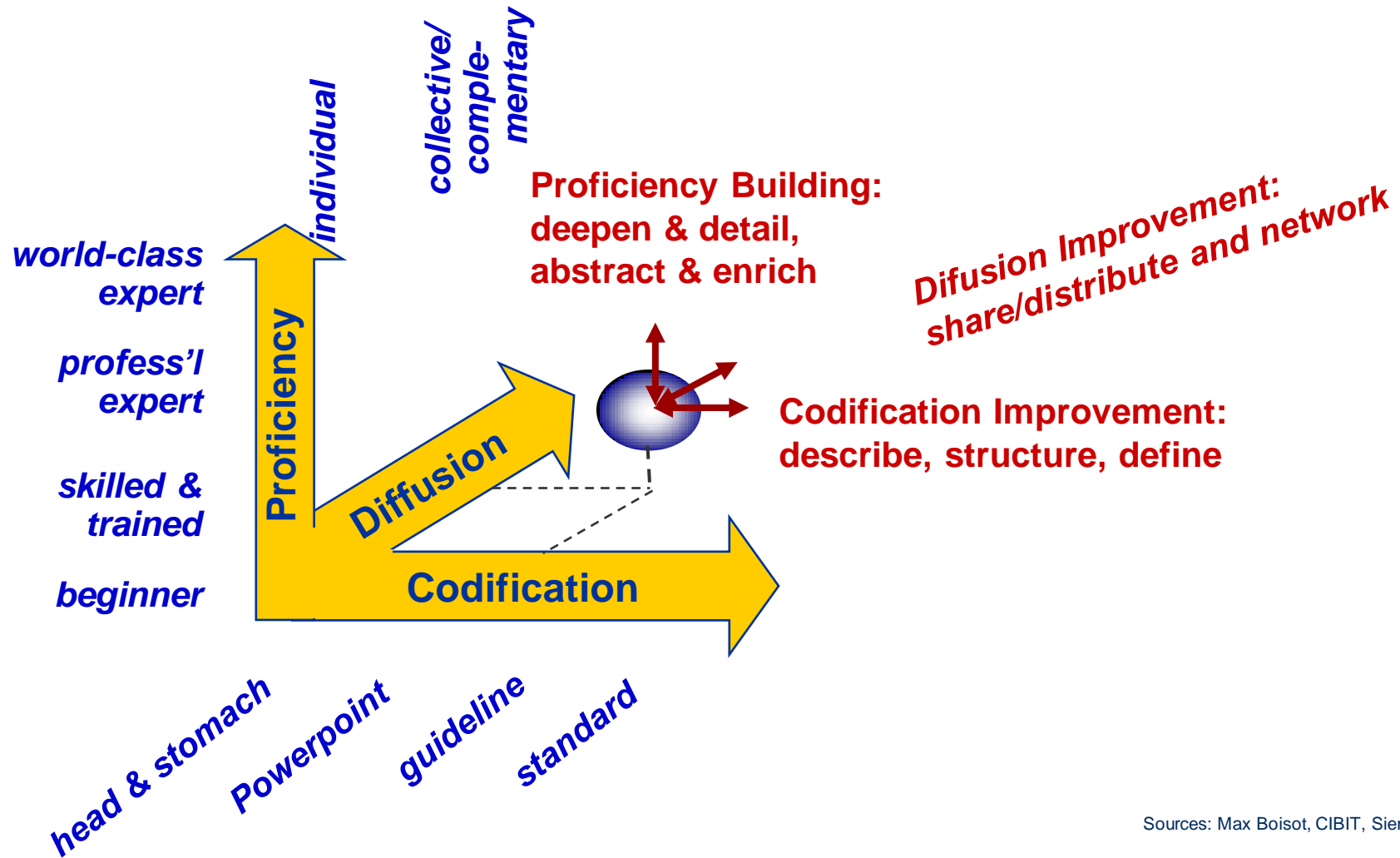
levels of knowledge diffusion across k. carriers, e.g. ranging from individual to organizational knowledge with two major forms: Collective K. (everybody has roughly the same K.) versus inter-connected complementary K. (everybody has a different part to be combined to an organizational capability).

Codification:

levels from implicit/undefined/un-structured K. to explicit/well defined and structured K., e.g. forms of documented K. ranging from gut feelings via discussions, notes, and reports to structured "Knowledge Objects" and standardized Best Practices.

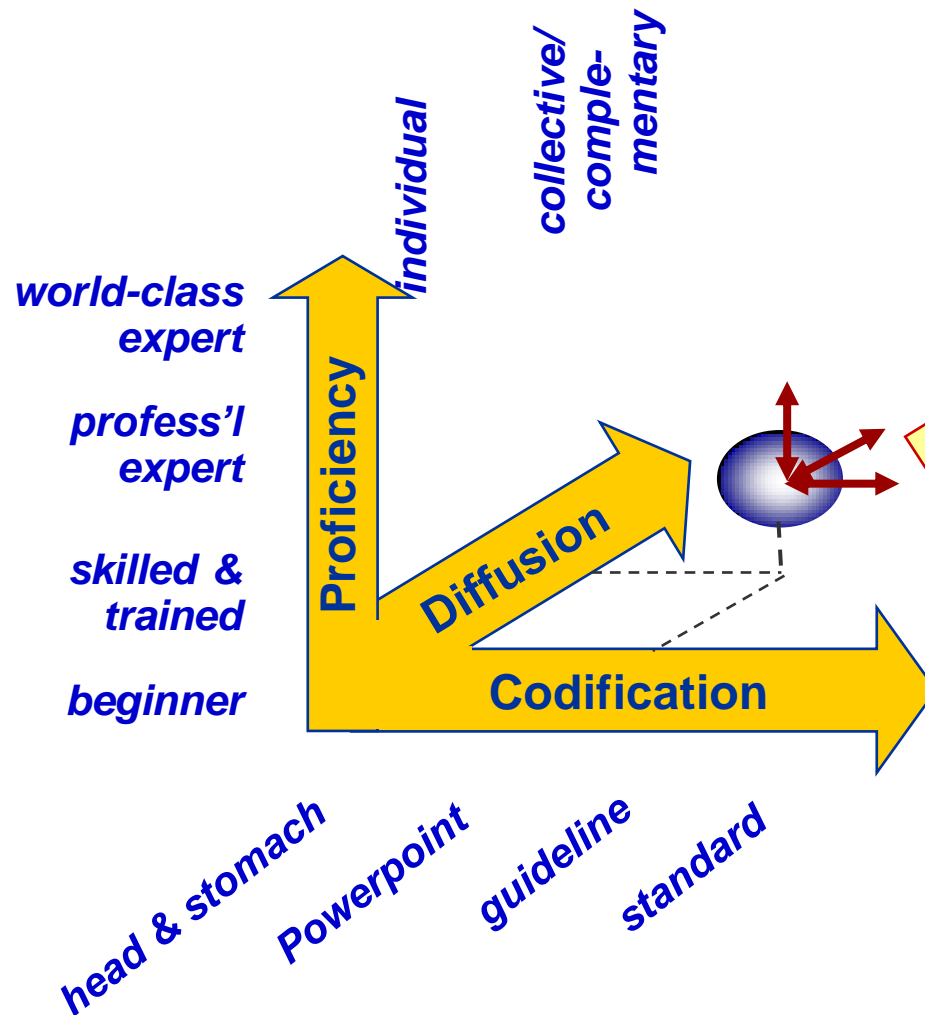
Sources: Max Boisot, CIBIT, Siemens

# Knowledge quality and KM processes for “Improve/adapt K Quality”



Sources: Max Boisot, CIBIT, Siemens

# KM's core value-add



## Core value-add by KM:

- **balanced:** trade-off options – optimizing in all dimensions
- **orchestrated:** coordinated proceeding of all related support disciplines
- **powerful:** multi-dimensional KM solutions leverage synergies

Sources: Max Boisot, CIBIT, Siemens

# Knowledge Definition: Knowledge Carrier perspective

## in humans

- education
- experience
- personal capabilities

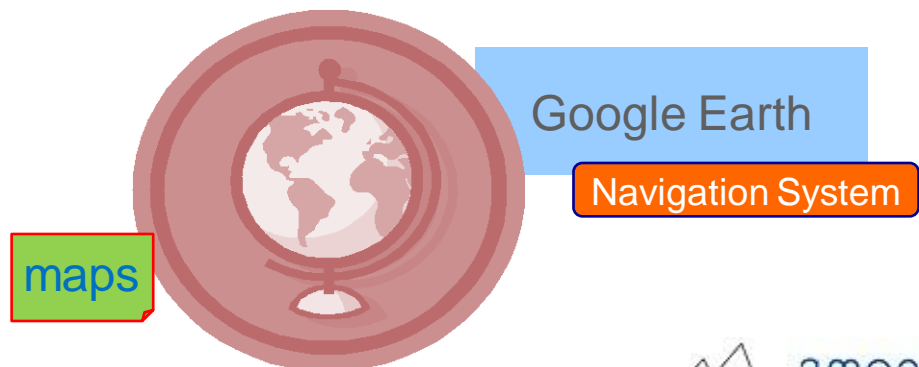
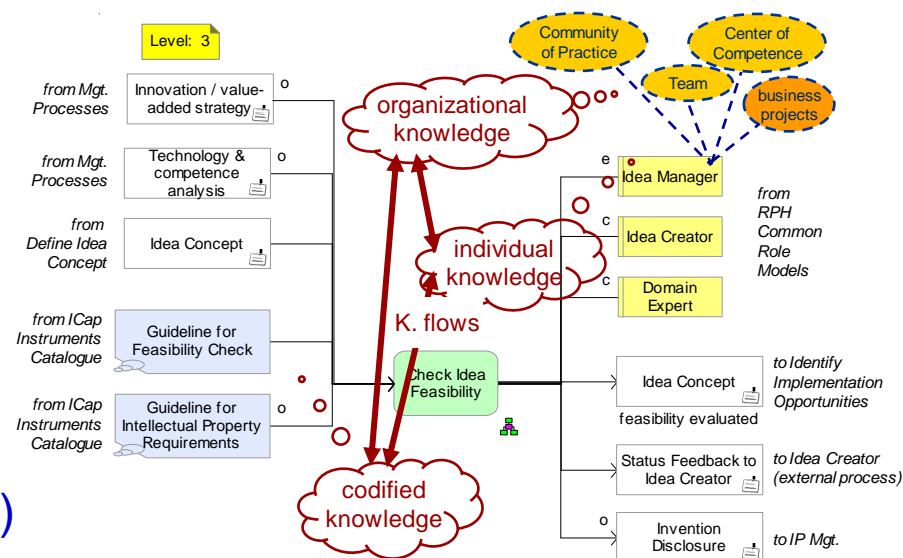


## in organizations

- collective knowledge
- inter-connected knowledge

## in information (described knowledge)

- in documents
- in information systems
- in artefacts



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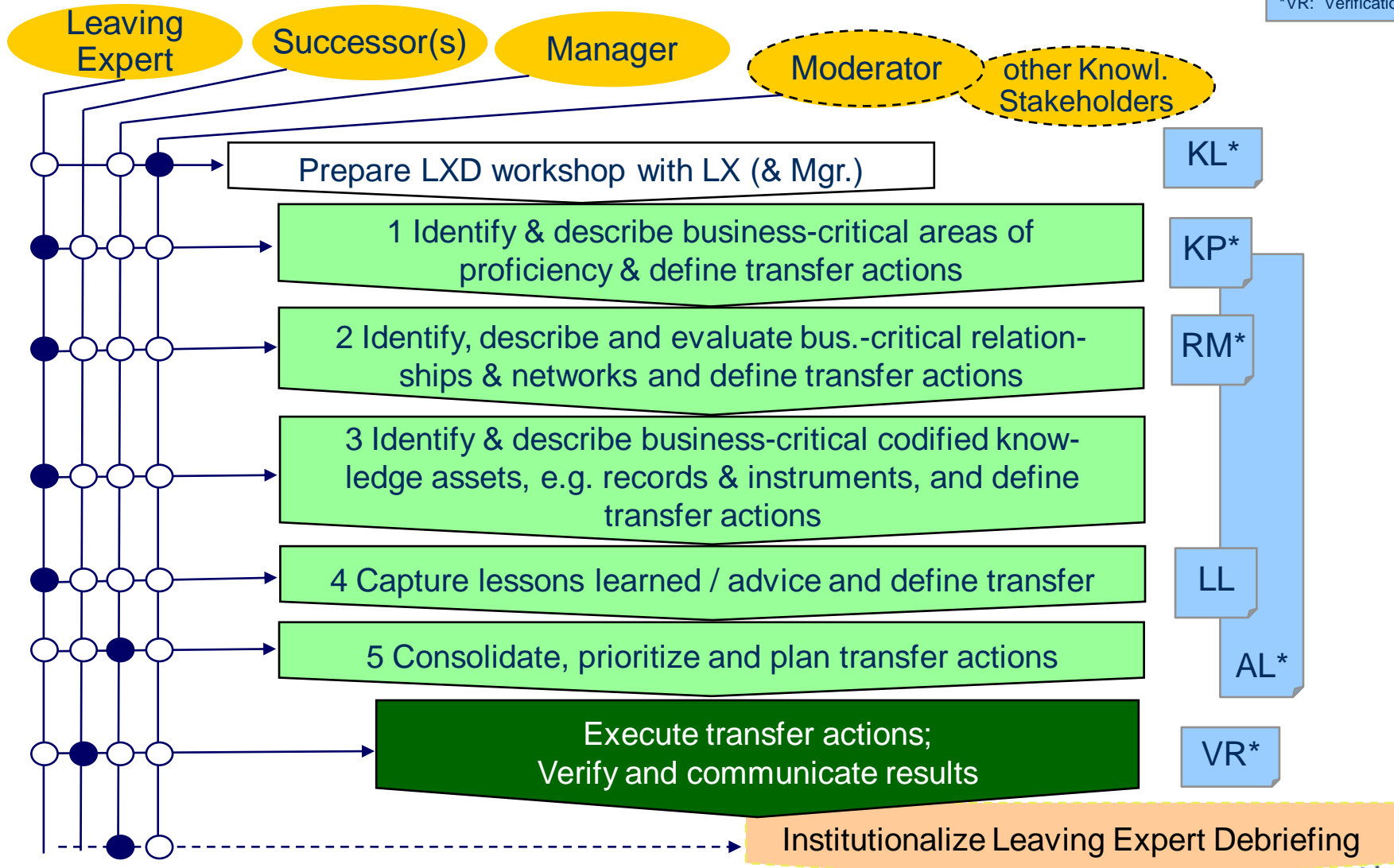
Examples and experiences, partly from KM consulting in  
Siemens AG



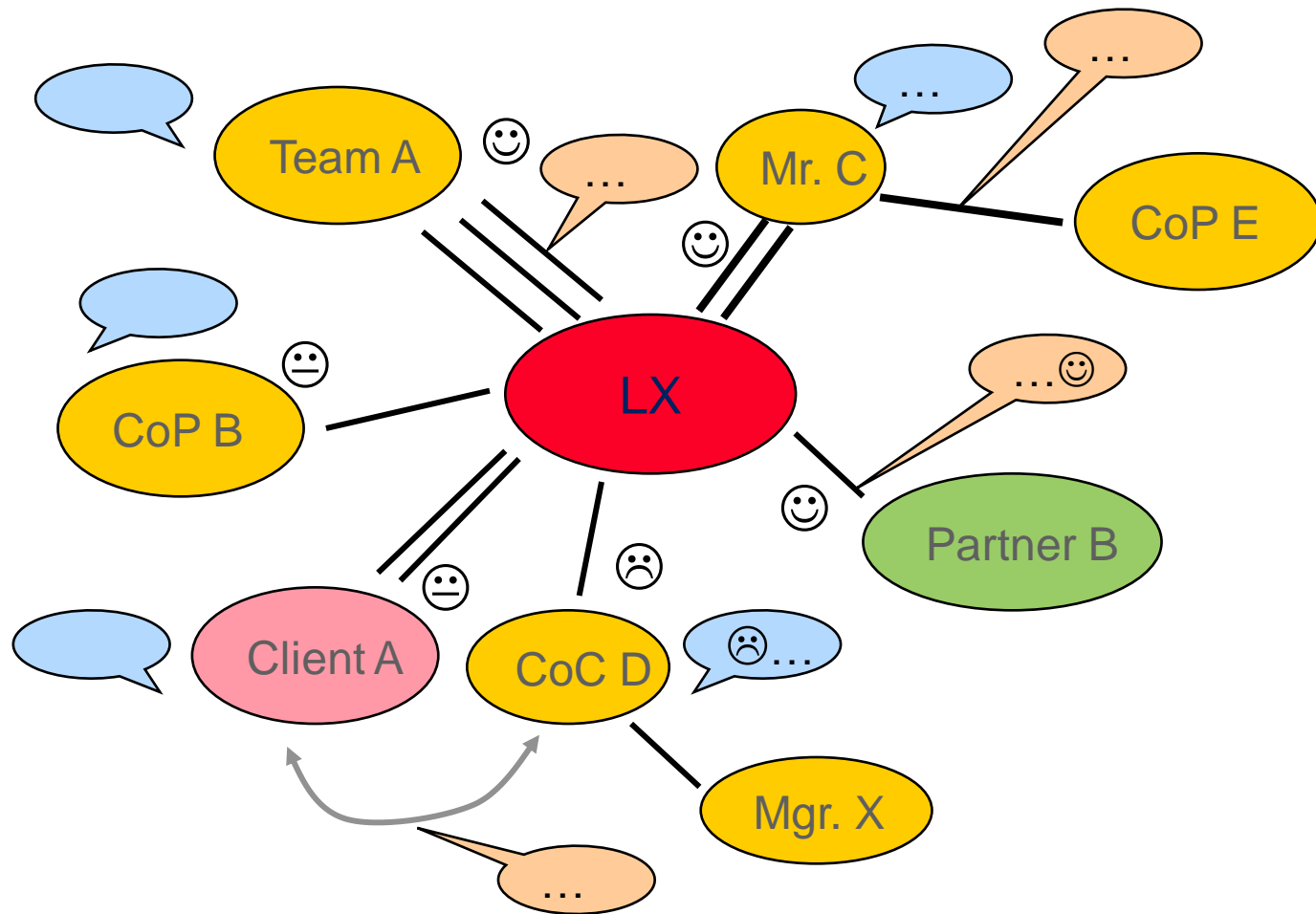
# Leaving Expert Debriefing process (LXD)

## Systematic Analysis and Transfer of Valuable Expert Know-how

\*KL: List of business-critical knowledge areas  
 \*KP: Knowledge Portfolio  
 \*RM: Relationship Map  
 \*LL: Lessons Learnt  
 \*AL: Action List  
 \*VR: Verification Report



# Leaving Expert's Relationship Map [RM] – strictly confidential



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Examples and Experiences, partly from KM consulting in  
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# 1 Identify & describe business-critical areas of proficiency & define transfer actions: Leaving Expert's (LX) bus.-critical Knowledge Areas List [KL]



*Knowledge Areas for: Output*

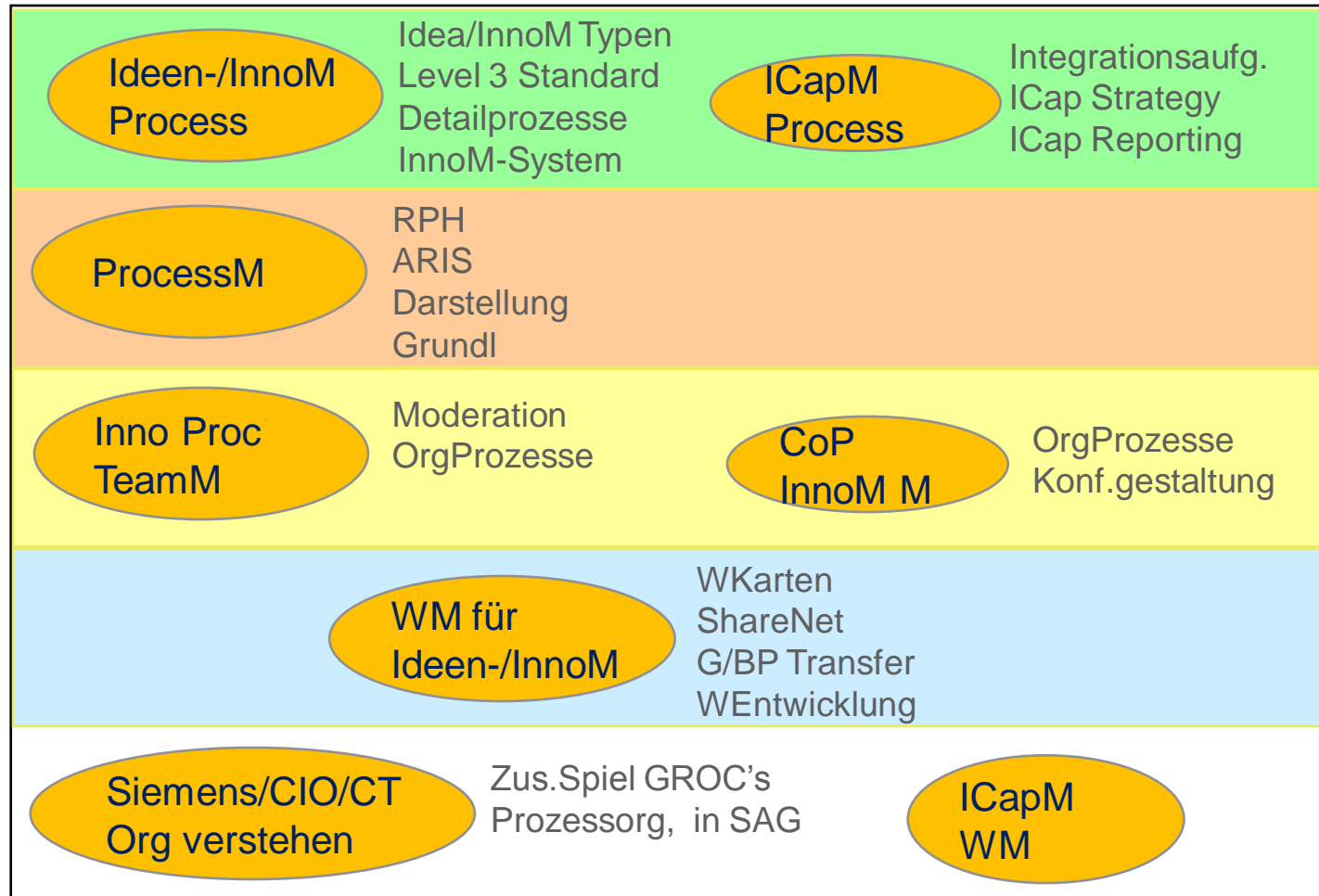
*Knowledge Areas for: Supply Chain*

*K. Areas for: Customer Relationships*

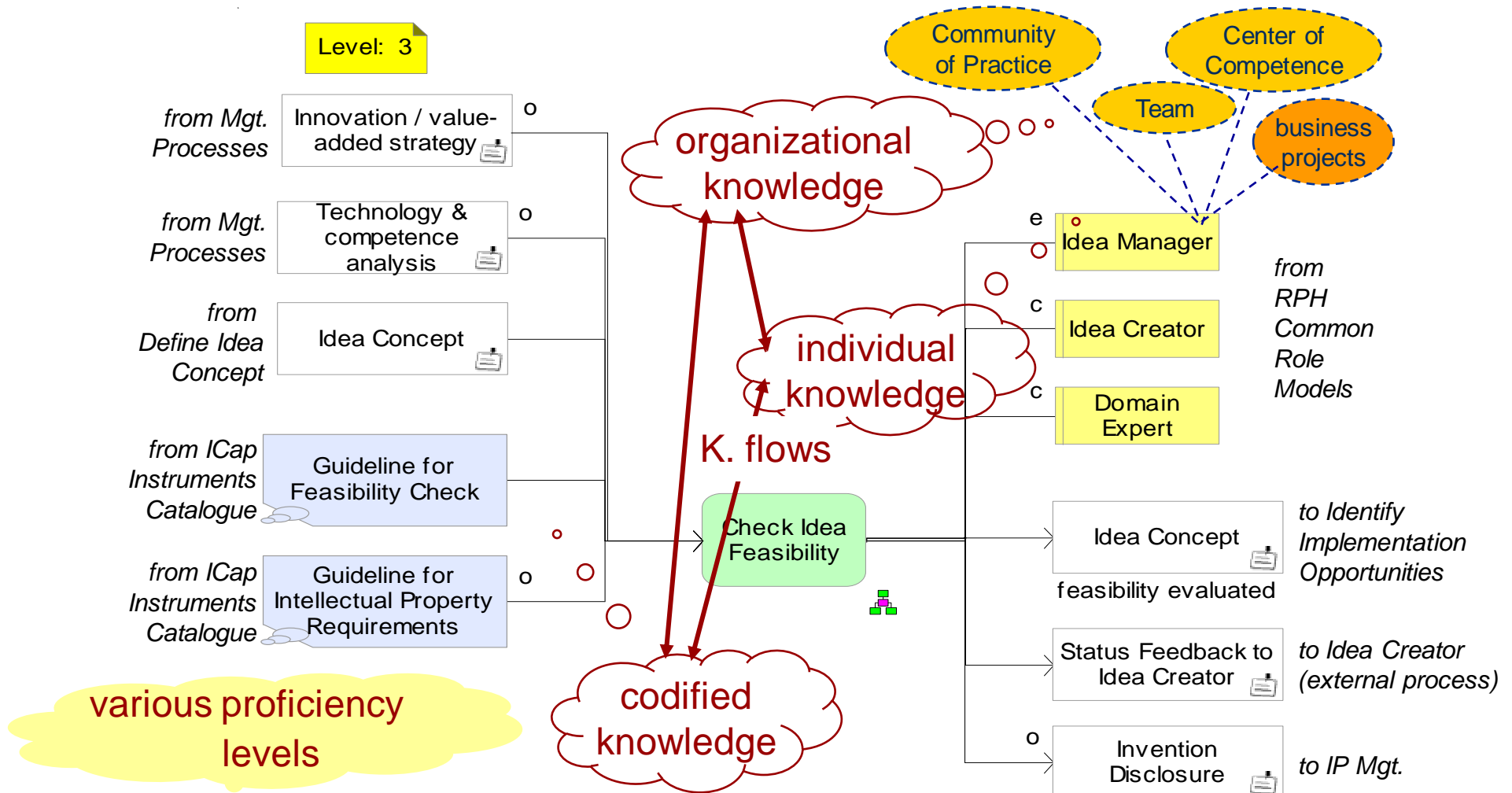
*K. Areas for: Mgt. & Support*

*K. Areas for: Business Background*

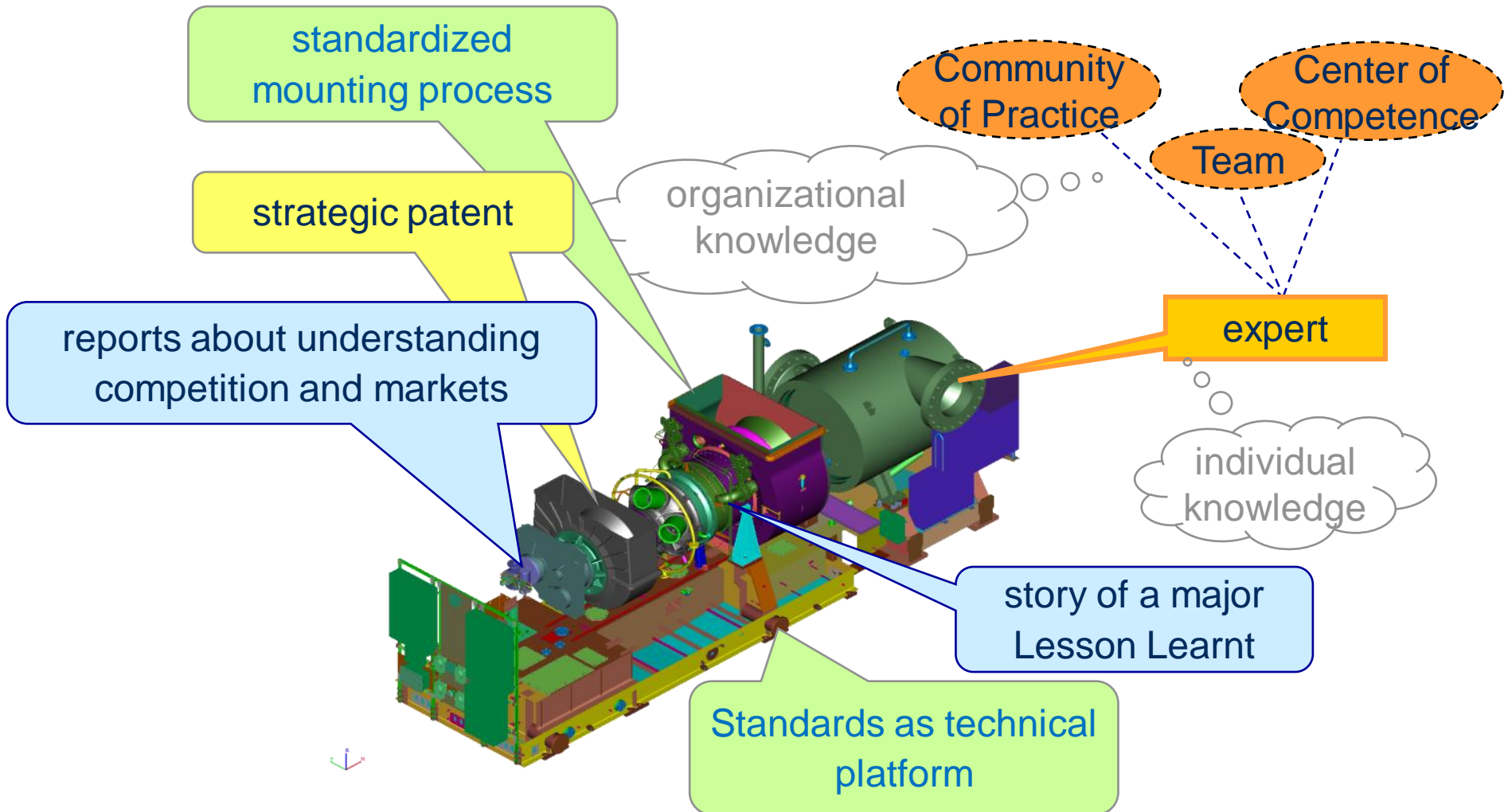
# 1 Identify & describe business-critical areas of proficiency & define transfer actions: Leaving Expert's (LX) bus.-critical Knowledge Areas List [KL] - example



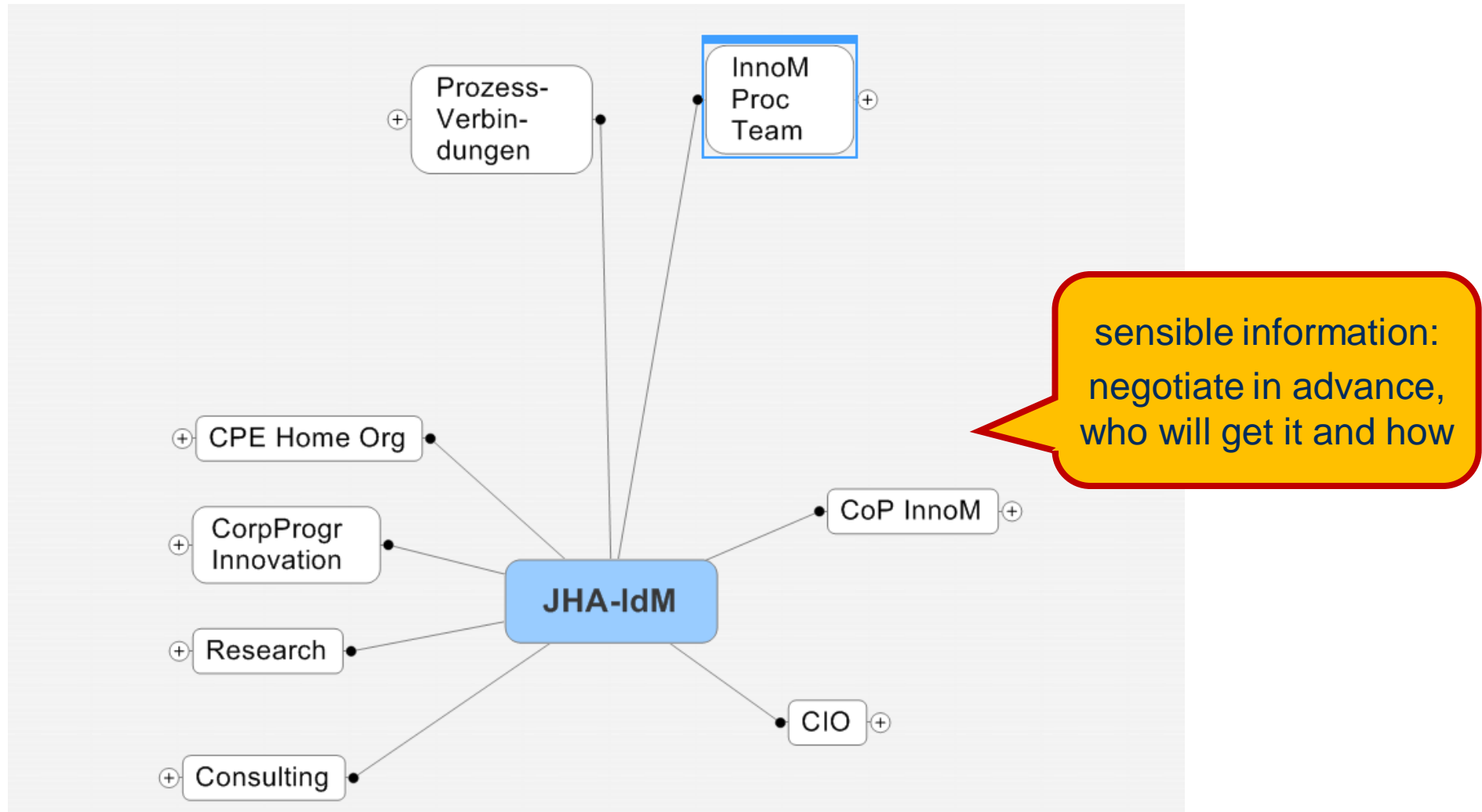
# Detailing Leaving Expert's bus.-critical Knowledge Areas: Process models are excellent knowledge maps



# Detailing Leaving Expert's bus.-critical Knowledge Areas: Product models are excellent knowledge maps



## 2 Identify, describe and evaluate bus.-critical relationships & networks and define transfer actions: Leaving Expert's Relationship Map [RM]





### 3 Identify & describe business-critical codified knowledge assets and define transfer actions & LX Debriefing result: Transfer Actions List [AL] - examples

#	Proficiency or Knowledge Asset/allocation – transfer action	prio	respon- sible	due date
1	Proficiency transfer actions: ... ... responsibilities, ...running/planned actions, ...			
2	Relationship building: ...			
3	Transfer of codified knowledge assets and related processes			
...	... Teamspace, ...Community Workspace, ... Website			
...	... Content Structure / Folder / Document / Catalogue / ... Prospect / ...			
...	... Model / Instrument / Workflow ...			
...				

## 4 Capture lessons learned / advice and define transfer

Lesson Learned / Advice and transfer proposal	Target group, various levels
	for successor(s)
	for role
	for group
	for department
	for company
	...

# Additional Lessons Learned from a series of Leaving Expert Debriefings (LXD)

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## ■ Management:

- Plan your future relationship to the Leaving Expert, before you start
- The LXD date should be as early as possible  $\leftrightarrow$  but the successor (s) has to participate
- Eventually invite interesting stakeholders in to the LXD
- Eventually invite higher level management for some time in the LXD
- Eventually announce and grant an effective recognition to the tandem Leaving Expert and Successor, if the transfer has been accomplished successfully

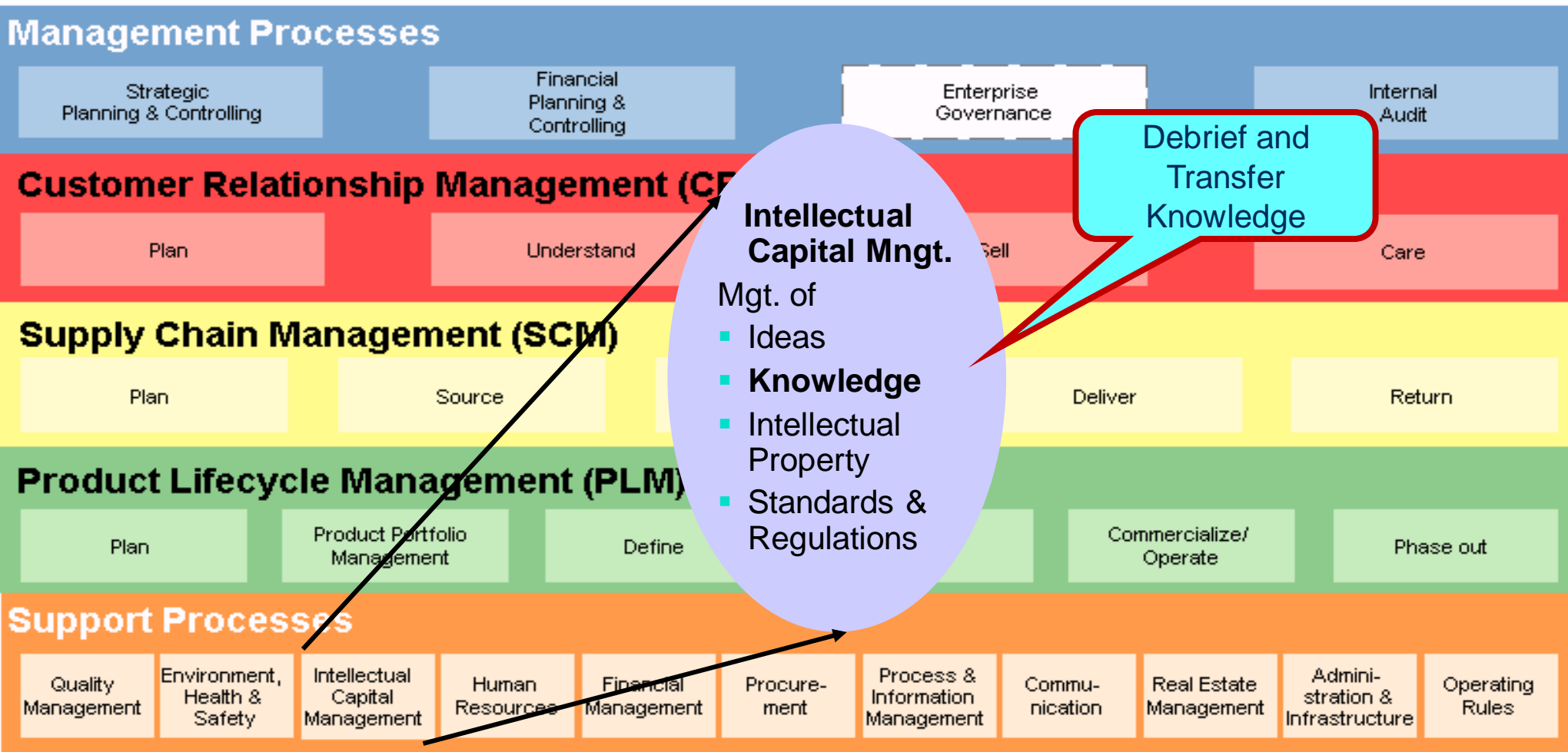
## ■ Moderator:

- Care for process and structure, but be flexible for unforeseen valuable dialogues
- Eventually extend relationship map with historical aspects
- Eventually classify relationships with proficiency characteristics (“practitioner”, “manager”, “researcher”, ...)

## ■ Management and Moderator:

- Proceed with care and trust-building – check your wording
- Focus on future knowledge importance for organization/business objectives
- Care for transfer action achievement and measure transfer success

# Leaving Expert Debriefing should be part of the general business process systematics - Example: Siemens Reference Process House



Source: Siemens AG

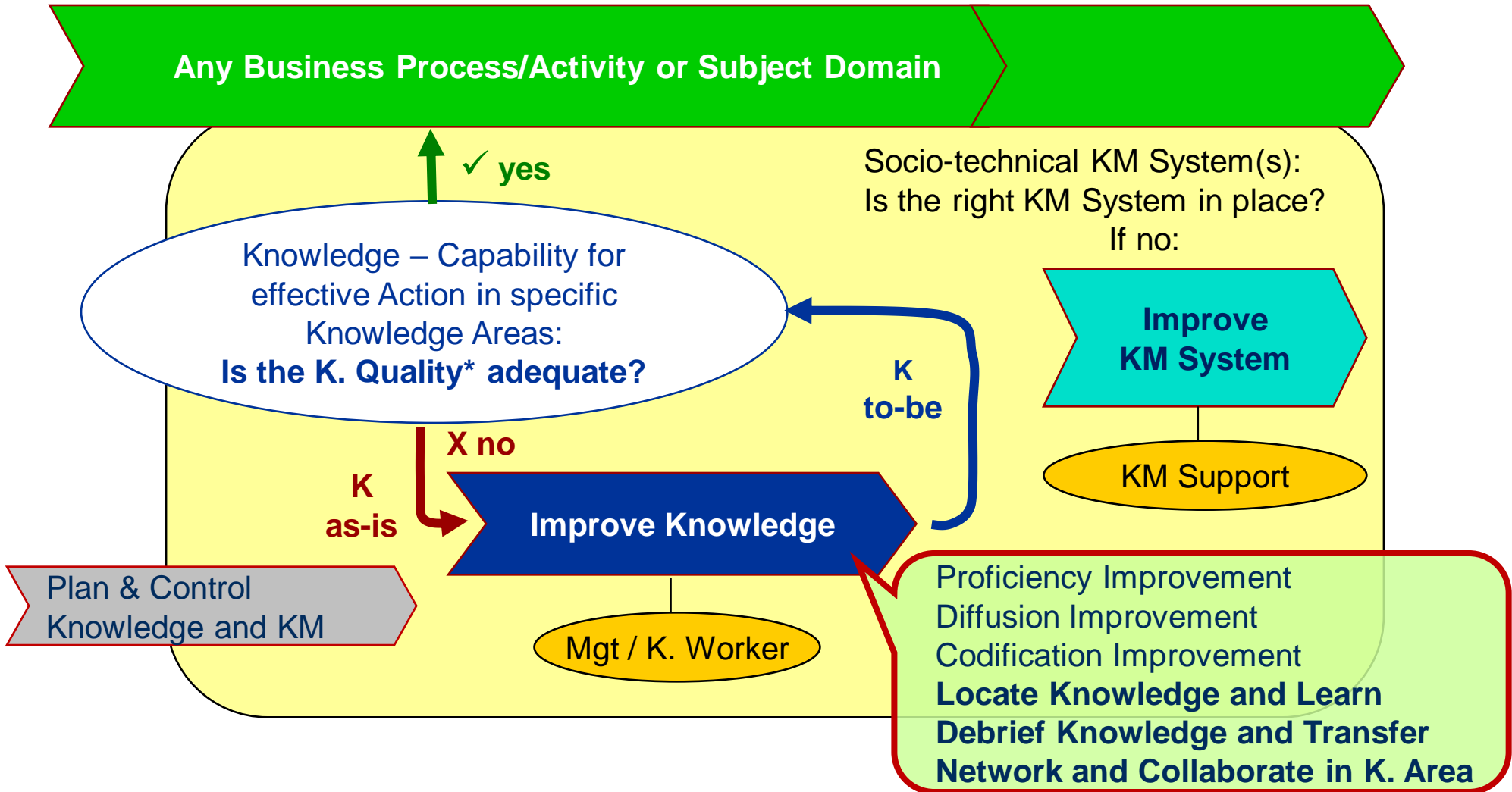
# KM Process Systematic: a result of the work group Knowledge Engineering und Management of the German BITKOM Association

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- comprehensive taxonomy for KM processes
- additional business story about applying the processes (inter-linked)
- Checklist for KM maturity of the organization (inter-linked)
- PDF hyper document in German, version 1, 2007
- **Download (also for non-members):**  
[http://www.bitkom.org/de/publikationen/38337\\_45785.aspx](http://www.bitkom.org/de/publikationen/38337_45785.aspx)

# KM Reference Processes in the BITKOM Guideline

## KM Process Systematic



# BITKOM Guideline *KM Process Systematic*: section

## B2 umfassende „mehr-dimensionale“ Vorgehen

### B2.1 W Lokalisieren & Aufnehmen (pull)

- Experten/Community/Kompetenzzentrum über Wissensprofil-/Wissenskarten-System suchen und Wissen austauschen (via ...)
- Dokumentiertes Wissen suchen, z.B. via Suchmaschinen, und Wissen erschließen (via ...)
- Dokumentiertes Wissen suchen und Wissen erschließen via Alert-Dienste setzen und nutzen und lernen (via...)

[\[zu Beispiel-Diagnosefragen B2.1\]](#) [\[zur Anwendungsgeschichte B2.1\]](#)

### B2.2 W Erfassen & Transferieren (push)

- Leaving Expert Debriefing & Knowledge Transfer
- Project Team Debriefing (z.B. Significant Milestone Reviews, Post Project Reviews, Peer Assists, After Action Review) & Knowledge Transfer
- Experten- und Gruppen-Debriefing (+ Ideen-Generierung) und systematische Gruppendurchmischung (z.B. World-Cafe, Syntegration-Methode von Malik, XENIA-Ansatz, Open Space Ansatz, ...)
- Training/Schulung aufbauen und durchführen
- Experten-/Ratgebersystem erstellen und einsetzen
- Lessons Learned erfassen und transferieren
- Best Practice Sharing and Replication

[\[zu Beispiel-Diagnosefragen B2.2\]](#) [\[zur Anwendungsgeschichte B2.2\]](#)

### B2.3 im W-Gebiet Vernetzen & Zusammenarbeiten (pull & push)

- Arbeitsgruppe bilden und zusammenarbeiten

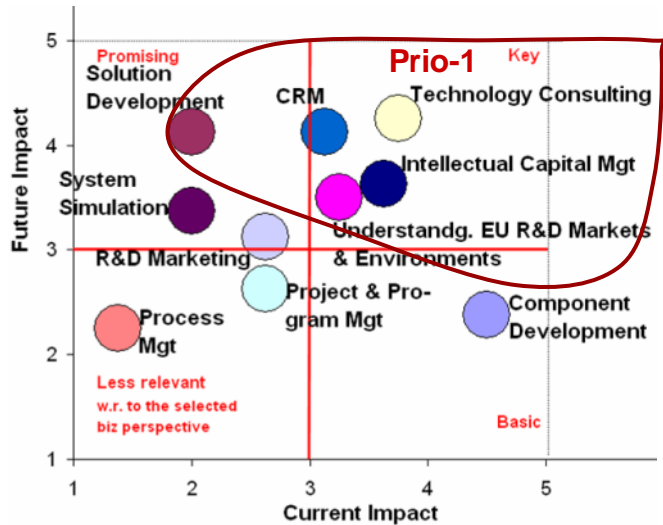
**B2.1] Firma A recherchiert alle interessanten Wissensquellen für „Produktionsbetrieb in China betreiben“ (Experten, Wissensnetzwerke und Informationssysteme) und setzt geeignete Benachrichtigungsmaßnahmen ein, um immer auf dem Laufenden zu sein, wenn etwas Neues zu diesem Thema auftaucht. Je nach Art der Wissensquelle ...**

[\[zurück zur Prozess-Systematik B2.2\]](#)

**Zu B2.1: Gibt es Prozesse und andere Unterstützung um (fehlendes) Wissen aufzufinden und zu übernehmen (lernen)? s. Detailprozesse Sind sie verständlich und zugänglich für alle, die sie brauchen?**

[\[zurück zur Prozess-Systematik B2.2\]](#)

# Identify Knowledge Risks by *Intellectual Capital Strategy Process* – an instrument from *Plan & Control Knowledge and KM*

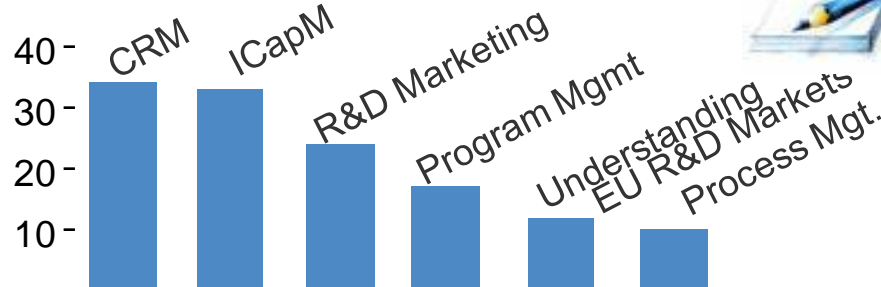


Portfolio of business-relevant Knowledge Areas and expected impact on business

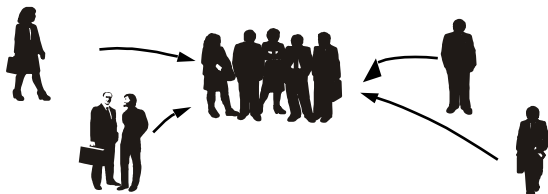
Derivation of ICap Improvements, e.g.

**ICap Risks / Debriefing needs**

**Strategic training needs**



**Strategic Communities of Practice**



**Business-driven ICapM Program**



# Contact

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# Further Readings and other KM sources

## ■ Contributions to KM books and publications:

- T. Davenport, G. Probst (eds): Siemens KM Case Book, 2nd edition, Wiley/Publicis, 2002
- M. Bellmann, et al (Hrsg): Praxishandbuch Wissensmanagement, Symposion, 2002
- C. W. Holsapple (ed.): Handbook on KM, Springer, 2002, pp. 443-466
- Deking, I, Management des Intellectual Capital, Gabler Verlag, 2003
- Hofer-Alfeis, J.: Effective Integration of Knowledge Management into the Business Starts with a Top-down Knowledge Strategy. Journal of Universal Computer Science, vol. 9, no. 7 (2003), 719-728
- Hofer-Alfeis, J.: Mehrwert und Zukunft von Wissensmanagement liegen im trans-disziplinären Vorgehen. In: KnowTech Konferenzband 2005, BITKOM, [www.knowtech.net](http://www.knowtech.net)
- Hofer-Alfeis, J.: Wissensmanagement im prozess-orientierten Unternehmen: Ist Prozessmanagement das pragmatischere Wissensmanagement? Beitrag in: KnowTech Konferenzband 2006, „Mit Wissensmanagement besser im Wettbewerb!“ München, 25.-26. Oktober 2006, [www.knowtech.net](http://www.knowtech.net)
- Contributions to special edition “Wissen managen” of “Mensch & Büro”, Ausgabe 3, 2006; [www.office-work.net](http://www.office-work.net)

## Recommended links for more information on KM:

[www.knowledgebusiness.com](http://www.knowledgebusiness.com)  
[www.wimip.de](http://www.wimip.de)  
[www.knowledgeboard.com](http://www.knowledgeboard.com)  
[www.cibit.com/site-en.nsf/p/-News](http://www.cibit.com/site-en.nsf/p/-News)  
[www.APQC.org](http://www.APQC.org)  
[www.eknowledgecenter.com](http://www.eknowledgecenter.com)  
<http://www.hrm-auer.ch>

## Books:

- Boisot, Max H.: Managing Knowledge Assets – Securing competitive advantage in the information economy. New York: Oxford University Press, 1998,
- Knowledge Management in Organisations: a critical introduction – Nov 2004 Donald Hislop, ISBN: 0199262063
- Learning to fly: practical knowledge management from leading and learning organisations – Nov 2004, Chris Collison, Geoff Parcell, ISBN: 1841125091
- Working knowledge: how organisations manage what they know – 2000 Thomas H. Davenport, Laurence Prusak, ISBN: 1578513015

# APQC's 2006/07 Benchmarking Study

## Study Scope / Extraction of Screening Survey



Microsoft Word  
Document

### Developing a Knowledge Retention Strategy

- Identify the need for a knowledge retention and transfer strategy (e.g., through statistics demonstrating increasing attrition of employees who possess key competencies).
- Develop the business case for knowledge retention and transfer.
- Identify and engage key stakeholders.
- Align the knowledge retention and transfer strategy with key organizational and business strategies and approaches

### Designing Knowledge Retention and Transfer Processes and Approaches

- Define the drivers for determining critical knowledge.
- Determine what critical knowledge needs to be retained (evaluate the potential value of knowledge loss) and transferred and its context.
- Establish comprehensive, systematic processes for knowledge capture and transfer and embed them in the workflow.
- Leverage existing process improvement vehicles (i.e., Six Sigma, Lean) where applicable.
- Align these processes with the employment lifecycle.
- Determine governance and IT resources needed for knowledge retention processes and approaches.

### Implementing Knowledge Retention and Transfer Processes and Approaches

- Develop training, marketing, and communications plans to develop and support a culture of knowledge retention.
- Identify and develop roles to support knowledge retention and transfer processes and approaches.
- Identify and develop pilot opportunities.
- Align IT capabilities and applications to support knowledge retention and transfer.

### Evaluating Success

- Set realistic goals.
- Establish measures to understand whether critical knowledge is retained and reused.
- Determine the impact on performance and to the business.
- Understand how to sustain and evolve the processes and approaches.