

# Knowledge Transfer between Retiring Employees and Their Replacements

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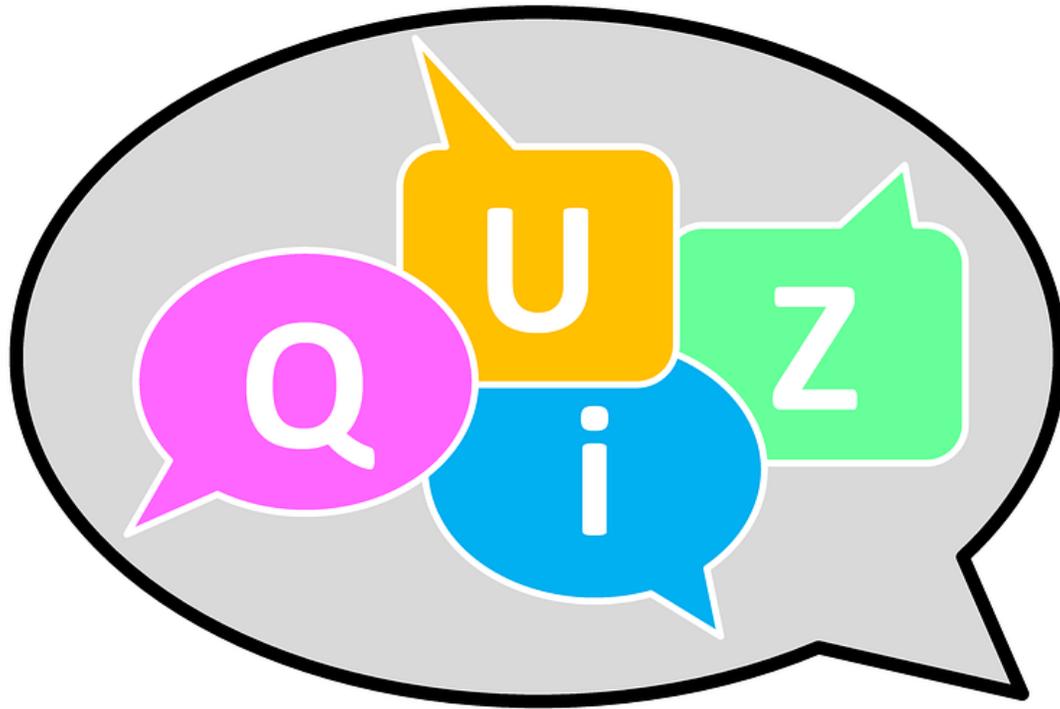
# Agenda

- Who Am I?
- Why Is This Important?
- Overview of Knowledge Transfer and Retention
- Knowledge Management Solutions
- Executing Successful Knowledge Management within Your Organization
- Benchmarking and Best Practices
- Moving Forward



- Joined Entergy in 2017 as an Organizational Effectiveness Consultant in the Nuclear organization.
- Transitioned to Manager, HR Business Partner in 2018 supporting Transmission and Enterprise Safety & Operations Excellence.
- Over 25 years of experience in HR and Operations with extensive knowledge in operational performance, change management, organizational effectiveness, leadership development, and HR consulting.
- Doctoral candidate in Human Capital Development from the University of Southern Mississippi.
- Professional HR certifications include: SHRM Senior Certified Professional (SHRM-SCP), Senior Professional in Human Resources (SPHR), Strategic Human Resources Business Partner (sHRBP).

**Anesa Davis**  
**Entergy**  
**Manager, HR Business Partner**



**Let's Start  
with a  
Knowledge  
Check!**

# Question 1

Please use the chat box to share your answer.

- Which do you prefer?
  - a) Coffee
  - b) Tea
  - c) None of the above

# Question 2

Please use the chat box to share your answer.

- Which are effective methods of knowledge transfer?
  - a) On-the-job training (OJT)
  - b) Formal Training
  - c) Mentoring
  - d) All of the above

# Question 3

Please use the chat box to share your answer.

- How do you identify critical knowledge?
  - a) Look for work being performed by a single person or only a few people
  - b) Look for areas where it takes a longer period of time to become proficient in the role
  - c) Both a & b
  - d) None of the above

# Question 4

Please use the chat box to share your answer.

- True or False: The cost of not finding the time to train employees will greatly outweigh the decision not to train, especially if you have an increase in retirement eligible employees.

True

## Why Is This Important?

- An increasing number of workers are approaching retirement age.
- Many of these workers possess critical knowledge and skills obtained from their years of work experience, especially in the nuclear industry.
- Knowledge and skills may be a mixture of explicit knowledge (documented knowledge) and tacit knowledge (undocumented information).
  - The loss of tacit knowledge that goes uncaptured before a retiring employee leaves the company can be critical to an organization.

# Reflection

- Think about your knowledge for a moment...
  - Is there any knowledge that you possess that others in your work group do not?
  - If so, is it information that would be beneficial for others to know?

# Overview of Knowledge Transfer and Retention

- Systematic, proactive approach to reduce the risk of loss of critical knowledge or skill when holders of that knowledge or skill separate from the company or move to new roles within the company.
- Knowledge is retained one of two ways:
  - When transferred to another employee or group of employees.
  - When captured as information in retrievable documents or records for use by other employees in the future.
- Typical events that trigger the use of knowledge management (KM) process or tools:
  - Routine business activities indicate employees holding critical knowledge may be a flight risk.
  - During succession planning activities, management identifies a KM risk.
  - Holder of critical knowledge notifies management of their intent to retire or leave.
  - Holder of critical knowledge is slated for a pending promotion.

# Knowledge Management

- Knowledge transfer and retention are a part of the knowledge management process.
  - Effective knowledge management takes advantage of existing business processes to capture, retain, or share knowledge.
- Knowledge management solutions:
    - Formal Training Programs
    - Informal Training
    - Mentoring & Job Shadowing
    - Change Management
    - SharePoint Functions
    - Policies, Procedures, & Work Packages
    - Contingent Workforce Program
    - Phased Retirement Program

# Using KM Solutions

Capture Knowledge of Retiring Employees to Share with Their Replacements

# Formal Training Programs

- Assign an expert to work with instructors to revise training materials to capture the critical knowledge in lesson plans.
- Once the knowledge is captured it can be transferred to other employees via the training program.
- Another option is to ask the knowledge holder to serve as an adjunct instructor or subject matter expert to train other employees.
- Ask the expert to provide on-the-job training for other employees so they can acquire the critical knowledge or skill.
- Assign an instructor to interview the knowledge holder. After the interview, the instructor can update lesson plans to capture information missing from the training program.

# Informal Training

Ask

Ask the knowledge holder to brief fellow employees on the topic during a department meeting or team “tailgate” discussion. Ask another employee to serve as the note taker to capture the information in writing.

Work

Work with the knowledge holder to prepare an overview of the topic to be included in a department newsletter.

Organize

Organize a "Lunch and Learn" and invite an expert to come and speak on a topic.

# Mentoring & Job Shadowing

- Designate another employee to become the new expert and assign the knowledge holder as the mentor to the new expert.
- Ask the expert to prepare a list of important tasks or evolutions a new employee would need to experience to become proficient on the topic.
  - Assign another employee to job shadow the expert during those activities.



# Change Management Process

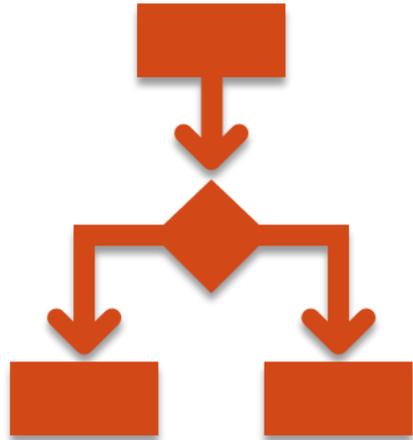
- Ask the expert to consider how they would turn over their position to another employee.
  - Prepare a change management plan to capture key elements of the turnover process.
- Assign the knowledge holder to prepare a personnel change checklist, making a list of their duties and responsibilities organized by frequency; one list for daily tasks, another list for weekly tasks, another for monthly, etc.
  - Once the list is complete ask the expert to prepare written instructions for any tasks for which there is no guidance.



# SharePoint Functions

- Create a Forum where participants can ask questions on a topic. Ask the experts on the topic to respond to the questions posted in the forum.
- Create a team “Wiki” where participants can collaborate to share what they know on a specific topic.
- Create a SharePoint contacts list to identify experts on various topics within your function.
- Create a document library where team members can archive documents on specific tasks.
- Conduct a series of "how to" interviews with the expert. Record videos or audio files of the interviews. Save the media files in a SharePoint library.

# Policies, Procedures, and Work Packages



- Assign the knowledge holder to markup an existing procedure or policy to capture their special knowledge or skill. Incorporate the new information in the next revision of the document.
- Assign a planner to work with the expert to revise work packages or procedures that cover maintenance on the systems or components.
- Create a new procedure, checklist, or work package to capture the expert's unique perspective or experience.

# Contingent Workforce Program

- Sometimes it may be more cost effective to plan for outsourcing after an expert leaves the company.
- This is most likely when the special knowledge is associated with an infrequently performed activity and for which there are service providers in the marketplace.
- Plan for a contingent worker to provide the knowledge or skill.
- Retirees may return as contingent workers after a six-month separation period in many organizations.

# Phased Retirement Program

- Invite the knowledge holder to participate in the Phased Retirement Program.
  - Your company may or may not have this program available.
- While in the program, assign the knowledge holder to mentor or train other employees to share their critical knowledge.



## Executing Successful Knowledge Management within Your Organization

- Identify critical knowledge areas and skills that are being performed by only person.
- Prioritize the identified list – focus on items that are being performed by a retirement eligible employee.
- Develop a scheduled plan to transfer the knowledge items.
- Identify and train people using various knowledge management solutions.
- Capture the content for each knowledge item.
- Store updated content and tools in an accessible location.

# Benchmarking and Best Practices

- Additional actions that can enhance knowledge retention and transfer programs.
- The following are areas that deserve further review and discussion:
  - Communities of Practice
  - Lessons Learned Exercises
  - Apprenticeship Programs
  - Greater access to subject matter experts
  - Storytelling Programs

# Moving Forward



Building capability and workforce readiness



Elevating competency and upskilling employees



Proactive strategy vs reactive strategy

# Questions?

Contact Anesa at [adavis2@entergy.com](mailto:adavis2@entergy.com)



**Thank you!**