

Knowledge Transfer: Passing The Knowledge Baton



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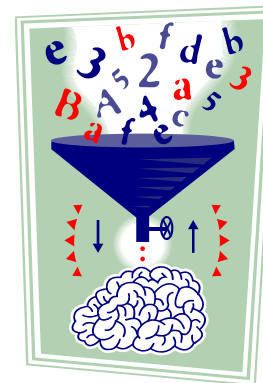
Case for Action

A long-time employee is due to leave the company in 60 days and people are lamenting how much valuable knowledge this person has “in their head” that will be lost forever when they depart.

Sound familiar? What do we do now?

Overview

- Set the Context
 - Ask-Learn-Share-**WIN!**
 - Our team's approach to KM
 - Where we sit in the organization
 - Our customers
 - Our focus, processes and tools
- Understand the business need
- Business Needs Assessment
- Knowledge Transfer Assessment
- Making knowledge enduring



Ask, Learn, Share – WIN!

Ask before undertaking any business activity - leverage available resources and sources of information

Learn during any business activity - learn while doing through collaboration

Share after any business activity - use knowledge sharing processes and tools to share what you have learned with others

WIN! to work more safely and efficiently while improving the speed and quality of delivery of products and services to our customers.

ASK



LEARN



SHARE



Our Team's Approach to KM

- Knowledge sharing (KS) is about *people* enabled by processes and tools to share what they know to improve individual and business performance
- Effective *content storage and retrieval* is vital to robust knowledge sharing
- KS tools and processes must enable and compliment *the way people do work*
- We will focus on the customer's *business need and advocate fit-for-purpose solutions*
- We will *leverage existing tools* to their fullest capabilities—any new tool must be ridiculously easy to use
- Apply *ESSA principles* in the design and execution of KS processes and tools
- We *will partner* with Learning, Information Management, Information Technology, Organizational, and HRitB to deliver integrated and holistic solutions efficiently
- Implement KS processes and tools ensuring their *value and ease of use* before using them with customers

* ESSA (Eliminate Simplify Standardize Automate)

Learning Transfer in Upstream Americas (UA)

Where we sit in Shell....



Learning Transfer in Upstream Americas

Our customers....

Exploration & Commercial

Finance

Deepwater

Human Resources

Onshore Gas

Safety, Environment &
Sustainable Development

Heavy Oil

General Counsel

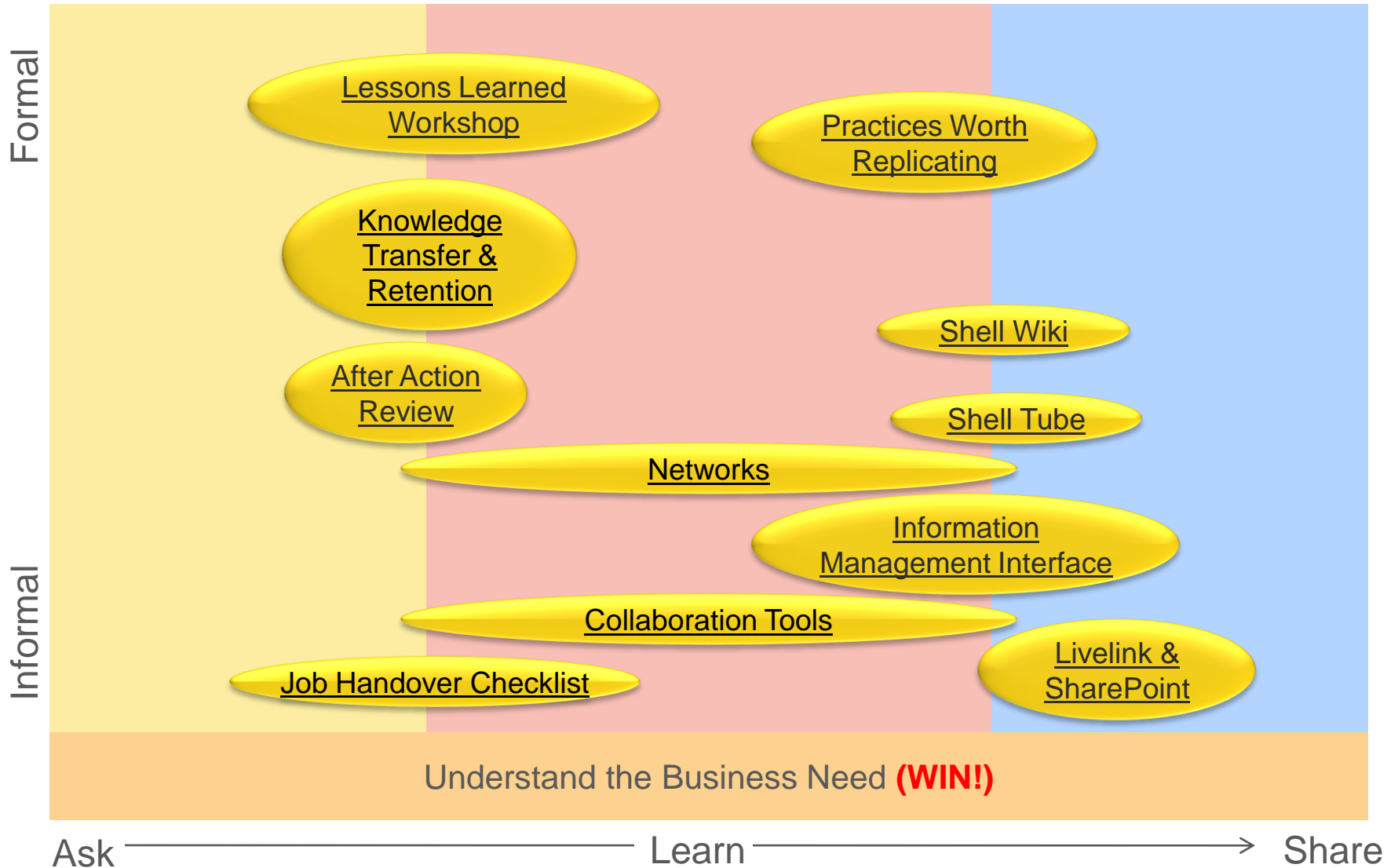
Networks

(e.g., SurfNet, AS&T, ChemTeam, GIS Users, SWAN, STAN, UACN, Production Geology, Turbodudes, Petrophysical, Reservoir Engineering, Production Technology, Production Engineering, Completions, Drilling, Geophysical, SEPCO HSE)

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Learning Transfer in Upstream Americas

The processes and tools we use....



Understand the Business Need (WIN!)

Understand the Business Need



- Create buy-in from Customer – Informal Contract

- Track Deliverables & Progress

- One place to store supporting documentation

Step 1 - Business Needs Assessment

Business Needs Assessment: Wells Team

UA Learning Transfer > Business Needs Assessment > Wells Team

Title

Wells Team

Business Needs

- (1) Susan's most senior geologist (Jane) is retiring on December 1, 2010. Jane has several years of highly valuable experience in drilling and core sample testing that we need to capture and share with some key folks in the team.*
- (2) Susan would also like to discuss the use of the PWR system to share best practices as they happen to avoid future potential loss of similar tacit knowledge.*

Customer

Susan Smith – Wells Team Chief

Background

Jane specializes in heavy oil and has been in her current role for 5 years and a geologist for Shell for 25 years.

Deliver By

November 10, 2010

Customer Resources

Susan has committed to approve expenditures of up to \$5k for costs related to this work and has committed to making all necessary resources available.

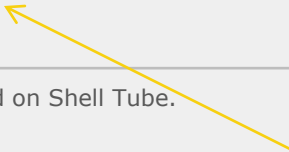
Comments

08/26/2010 *Susan is under the impression that Jane has binders and/or plots that we'll need to get back and do something with. Since Jane has been here for so long, we'll need to find a way to manager her information.*

Step 2 - Knowledge Transfer Assessment

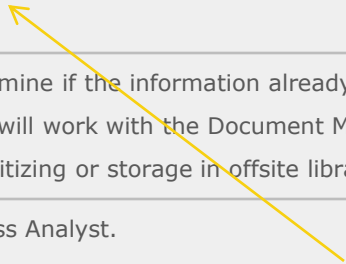
Title	Susan Smith, 15/10/2010
Context	Susan's most senior geologist (Jane) is retiring on December 1, 2010. Jane has several years of highly valuable experience in drilling and core sample testing that we need to capture and share with some key folks in the team.
Assessment Participants	Jane Doe, Susan Smith, Darren Hunter (LT)
Knowledge Holder	Jane Doe
Knowledge Recipients	Paul Miller (New Orleans), Cathy Creston (Houston), George Curious (Calgary)
Where are the Gaps	Jane also has extensive critical knowledge on: (1) How to test core samples. We will need to have Jane share her "Tips & Tricks" during training for the remaining team members. (2) Jane has several hard copy documents that need to be kept as backup in case there's an issue with a well. (3) She also is the owner of several Wiki articles and Livelink Folders. (Susan will have to review the articles to decide if they should be kept and will need to assign it to an existing member of her team. No action for LT.) As a member of APEGGA, she also has several white papers saved in (3) email attachments.
Existing Records	Jane has 10 binders under her desk as well as multiple e-mail folders from internal projects to external engineering committees, websites, software programs etc..
Information Classification	Restricted
Transfer Timing	November 10, 2010.

KTA (continued)

Method 1	Demonstration	 <ul style="list-style-type: none"> After Action Review Ask The Expert Demonstration Field Trip IM Business Analyst Job Handover Checklist Lessons Learned Workshop Lunch and Learn Master Class Recording Meet and Greet Recorded Live Meeting Recorded Video Conference or Session ROCK Lite ROCK (full) Other
Method 1 Storage	The recorded session will be shared on Shell Tube.	
Method 1 Client Actions	Identify proper meeting location and attain necessary approvals to watch how a core sample is taken then tested.	
Method 1 Client Due	November 1, 2010	
Method 1 LT Actions	Assist with the logistics of video recording and posting the core sample training to Shell Tube.	
Method 1 LT Participants	Jean	
Method 1 LT Due	October 20, 2010	

KTA (continued)

Method 2	IM Business Analyst	
Method 2 Storage	The IM Business Analyst will determine if the information already in a document repository (Iron Mountain). If not, will work with the Document Management team to decide if information requires digitizing or storage in offsite library.	
Method 2 Client Actions	Jane to send binders to IM Business Analyst.	
Method 2 Client Due	October 15, 2010	<ul style="list-style-type: none"> After Action Review Ask The Expert Demonstration Field Trip IM Business Analyst Job Handover Checklist Lessons Learned Workshop Lunch and Learn Master Class Recording Meet and Greet Recorded Live Meeting Recorded Video Conference or Session ROCK Lite ROCK (full) Other
Method 2 LT Actions	Contact Information Management Team.	
Method 2 LT Participants	Pam & John (Information Management Advisors)	
Method 2 LT Due	October 1, 2010	

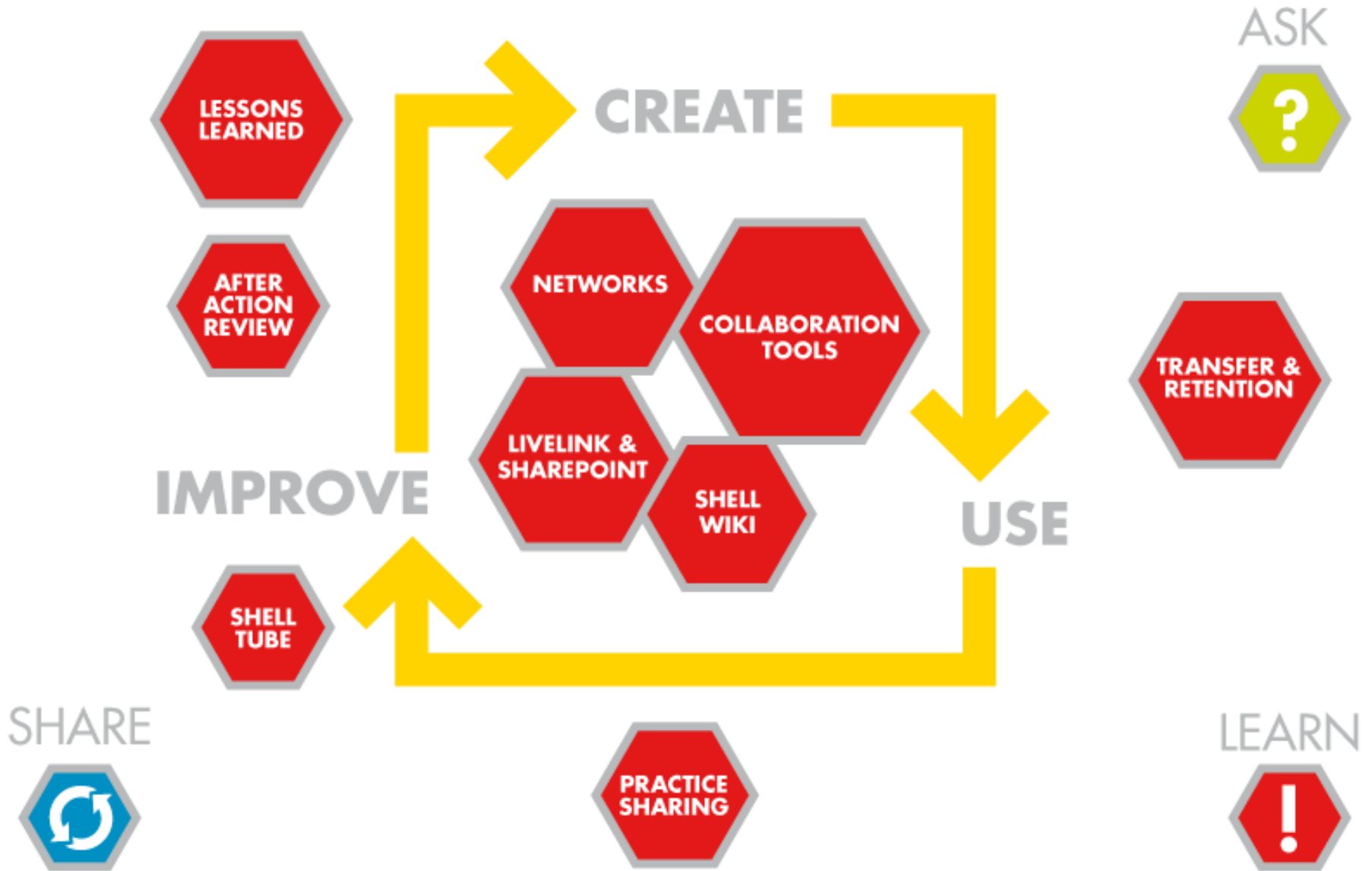


KTA (continued)

Method 3	Job Handover Checklist	
Method 3 Storage	Wells team Livelink space.	
Method 3 Client Actions	Jane to complete all appropriate steps in the Handover Checklist as well as review e-mail folders for business critical e-mails. Key e-mails will be uploaded to Livelink using Livelink Explorer.	
Method 3 Client Due	October 15, 2010	
Method 3 LT Actions	Provide Job Handover Checklist and email management instructions. Provide Information Management contact to assist with taxonomy and coaching on moving mails to Livelink. PowerPoint presentation provided on how to copy e-mails to Livelink.	<ul style="list-style-type: none"> After Action Review Ask The Expert Demonstration Field Trip IM Business Analyst Job Handover Checklist Lessons Learned Workshop Lunch and Learn Master Class Recording Meet and Greet Recorded Live Meeting Recorded Video Conference or Session ROCK Lite ROCK (full) Other
Method 3 LT Participants	Darren	
Method 3 LT Due	October 15, 2010	



Making Knowledge Enduring



Summary

- Identifying and transferring critical tacit knowledge is important to the business.
- Experts and their knowledge are vital to the business but also a vulnerability if knowledge is not captured and shared.
- Knowledge is created or used every day. How much effort do we expend to capture improvements or make it usable by others?

