

## Understanding Structured Knowledge Transfer

A team encounters a problem that should be routine, but no one is quite sure how to handle it. In the past, there were always team members who had seen this issue before and knew exactly what to do to resolve it quickly, but they are no longer with the organization. Their knowledge was never fully documented or transferred, and now the team is left to piece things together through trial and error. What was once routine becomes slow, uncertain, and prone to mistakes.

This situation is common in organizations where critical knowledge remains tied to individuals instead of being captured and shared more broadly. When that happens, teams lose access to hard-earned experience, work becomes less consistent, and the organization needs to rebuild knowledge it once had. Knowledge management helps organizations avoid this outcome by ensuring that critical knowledge is captured, transferred, and available when employees need it.

### What Is Structured Knowledge Transfer?

Structured knowledge transfer is the process of pinpointing, capturing, and passing on valuable tacit knowledge (undocumented knowledge derived from years of hands-on experience) that is stored in experts' and other knowledgeable people's heads. Organizations engage in structured knowledge transfer to:

- Prevent critical knowledge from being lost when employees retire or move on
- Support professional development for up-and-coming employees
- Improve business agility and resiliency through improved access to critical knowledge

The results of structured knowledge transfer can be highly valuable, but the process itself is resource intensive.

Some tacit knowledge can be captured in ways that allow for one-to-many dissemination (e.g., documents, visual models, training courses, [communities of practice](#)), but only with a strong partnership between KM and the business. The KM team needs support from the business to find the right facilitator—someone who knows enough about the topic to ask the right questions—and help transform the raw materials into a finished product from which others can reference and learn.

On the other hand, some knowledge can only be transferred directly from person to person. While this can be a rewarding experience for both sides, it takes time and doesn't scale.

### Tips and Best Practices for Structured Knowledge Transfer

The key to success with this approach is figuring out what's worth transferring and what's not, then finding the best method of capture and transfer. The following are APQC's most important and enduring best practices for structured knowledge transfer.

## Start with Knowledge Mapping or a Knowledge Audit

Because structured knowledge transfer takes significant time and effort, organizations should first curate a limited number of critical areas where the investment will pay off. The best way to do this is through either:

- **Knowledge Audits:** An inspection of knowledge assets and evaluation of the KM strategy; or
- **Knowledge Mapping:** An outline of the tacit and explicit knowledge involved in each step or aspect of a business process, role, or activity.

These approaches can be deployed at the organizational level, or at the level of a department or business area. Both approaches help KM and business leaders understand where critical knowledge is, how it flows, and the most important barriers and gaps to fix.

While these two approaches can be applied independently, using both together offers the most holistic and informed basis for evaluating needs and opportunities for structured knowledge transfer. Knowledge audits pull in the bigger picture of KM strategy, whereas knowledge maps offer a more practical, tactical means of assessing knowledge flow and finding gaps. Knowledge audits tend to be most helpful for figuring out what problems you want to solve and why you need to do structured knowledge transfer, but knowledge maps are better for pinpointing where critical knowledge lies, who has it, and who needs it.

## Compare and Prioritize Knowledge Transfer Opportunities

Once you have a list of critical areas where structured knowledge transfer is needed, the next step is to prioritize that list. Why? Of course, there's the simple fact that you can't tackle everything (or use up all your time and resources) at once. But more importantly, some opportunities to capture knowledge will disappear if the employees who hold this knowledge retire or otherwise leave the organization. Additionally, some opportunities to transfer knowledge will be more urgent than others.

We recommend [APQC's Knowledge Loss Risk Matrix](#) as a simple, effective, and holistic prioritization tool. The matrix helps identify knowledge areas that are at the highest risk of loss and most critical to document or transfer. Filling out the matrix with business stakeholders (e.g., managers and subject matter experts) also helps build buy-in for the time, resources, and effort needed to perform structured knowledge transfer.

## Consider a Variety of Approaches

There are many ways to do structured knowledge transfer. While all approaches can work, some work better than others depending on the knowledge transfer need, the expert, and the organization. APQC advises KM teams to [think carefully about which approach is best suited](#) to each knowledge transfer scenario. Choosing the wrong approach can lead to many headaches for KM, business stakeholders, learners, and the experts themselves.

APQC's [Structured Elicitation Approaches for Knowledge Transfer](#) offers an overview of available approaches that are best suited to different knowledge transfer needs, their pros and cons, requirements, and expected outputs/results. Pay close attention to the requirements column to avoid common pitfalls.

## Make Knowledge Transfer a Time-Bound Event

Structured knowledge transfer requires participants to carve out time away from their normal job duties. For this approach to succeed, the KM team needs to outline the limits and requirements of each engagement. It's much easier to convince experts to participate (and convince their managers to support their participation) when the objectives, timeline, and commitments are laid out in a clear project plan.

It's also important to secure time and space for the recipients of knowledge (i.e., learners) to play a role in knowledge transfer. The people who will learn from and apply the knowledge are not just passive receptacles. They will have questions to clarify and build on what's shared. This feedback should be integrated into the transfer process to ensure experts/knowledge sources are sharing everything that recipients need to know in a way that makes sense for them.

## Celebrate Experts for Their Knowledge

No matter which approach you choose, structured knowledge transfer is a big ask for any expert. It takes time, requires deep thinking, and for some, sounds like a potential threat to their careers and social capital (“Are they taking my knowledge so they can replace me?”). Thus, it’s vital to position knowledge transfer as a special, coveted opportunity and a cause for celebration. There are many ways to accomplish this, including:

- Recognition in corporate communications (e.g., newsletters, the company intranet, all-hands meetings)
- Personalized thank-you notes from senior leaders and knowledge recipients
- Exclusive company branded merchandise
- Awards (including physical awards as well as virtual “badges” on the company’s people profile system)
- Official fellows’ program or subject matter expert designation

KM teams can work with partner functions and business stakeholders to find ways to celebrate experts in ways that are most meaningful to them. Note that, while many experts love to be recognized through corporate communications and showy awards ceremonies, some feel uncomfortable in the spotlight and would prefer a more private and personal mode of appreciation.

## Partner with Organizational Learning to Integrate with the Employee Lifecycle

Structured knowledge transfer works best when it’s aligned to the employee lifecycle. Of course, you want to transfer knowledge from experts and knowledgeable people before they walk out the door, but it’s also crucial to bring in knowledge recipients at the right stage of their careers. You don’t want to bring in a new hire without the foundational understanding to “get” what the expert is sharing, but you also don’t want to burden mid-career folks with roles that could be handled by less-experienced people. Some of the best knowledge transfer teams include a variety of experience levels, but you need to be intentional about who you include and when.

The best approach is to work with your HR and organizational learning teams to integrate knowledge transfer into career ladders. This creates a standard process through which learners participate at their most teachable moments, and knowledge sources shared at stages that are less stressful and more valuable for them. We strongly recommend [partnering with Organizational Learning](#) in all structured knowledge transfer efforts, as this group can help in integrating the knowledge into training and reference materials as well.

## Key Takeaways

Structured knowledge transfer is at the upper echelon of [KM approaches](#) in terms of the forethought, time, and effort required to get it right. However, when it is done right and applied to the right opportunities, it creates results that could not be achieved in any other way. APQC recommends using it wisely and sparingly.

For additional guidance, see APQC’s [Understand and Compare Knowledge Management Approaches](#) and [KM Essentials: How to Transfer Knowledge](#) collections.

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