

Create a Comprehensive Knowledge Capture and Transfer Strategy Focused on Business Continuity

Best-practice organizations start with a solid strategic foundation

Organizations that want to improve their knowledge capture and transfer approaches need to ask themselves: Do we have a comprehensive strategy to address how knowledge is collected, shared, accessed and reused enterprise-wide? Or do we carry out random acts of knowledge capture and transfer in response to specific needs? A good knowledge capture and transfer strategy should lay out a methodology and long-term plan, including:

- ▶ who the key stakeholders are (including leaders and end-users),
- ▶ where the funding will come from,
- ▶ a timeline for completion or milestones to show progress,
- ▶ what techniques will be used,
- ▶ other resources (e.g., people and technology) that will be required, and
- ▶ who is responsible and accountable for results.

All six best-practice organizations in APQC's 2013 [Transferring and Applying Critical Knowledge](#) Best Practices Study have well-developed knowledge capture and transfer strategies that balance people, processes, and technology. The strategies focus on business goals, rely on strong partnerships with internal business partners, and reflect the appetite of the organizations for knowledge management (KM). By contrast, only 31 percent of the study sponsors have such strategies, with 46 percent reporting that such strategies are under development and the remaining 23 percent indicating that their organizations have no such strategies and processes at this time.

Tying the Strategy to Business Continuity and Goals

An organization without any strategy for knowledge capture, transfer, and reuse is at a severe disadvantage, but simply having a strategy is not enough. A critical success factor for any knowledge capture and transfer strategy is the value proposition. To articulate the value proposition, the KM team must ask itself: Why do we need to capture and transfer critical knowledge? What will happen if we don't? Although half the best-practice organizations featured in [Transferring and Applying Critical Knowledge](#) have aging work forces, the underlying driver of their knowledge capture/transfer programs is business continuity, whether that means dealing with a retirement crisis, relocation, or merger/spinoff or simply enhancing the consistency of delivery across business units and regions (Figure 1). Even in cases where a best-

practice organization began with a narrow focus, it ultimately expanded its strategy to address more than the initial problem or challenge.

Drivers of Study Participants' Knowledge Capture and Transfer Strategies

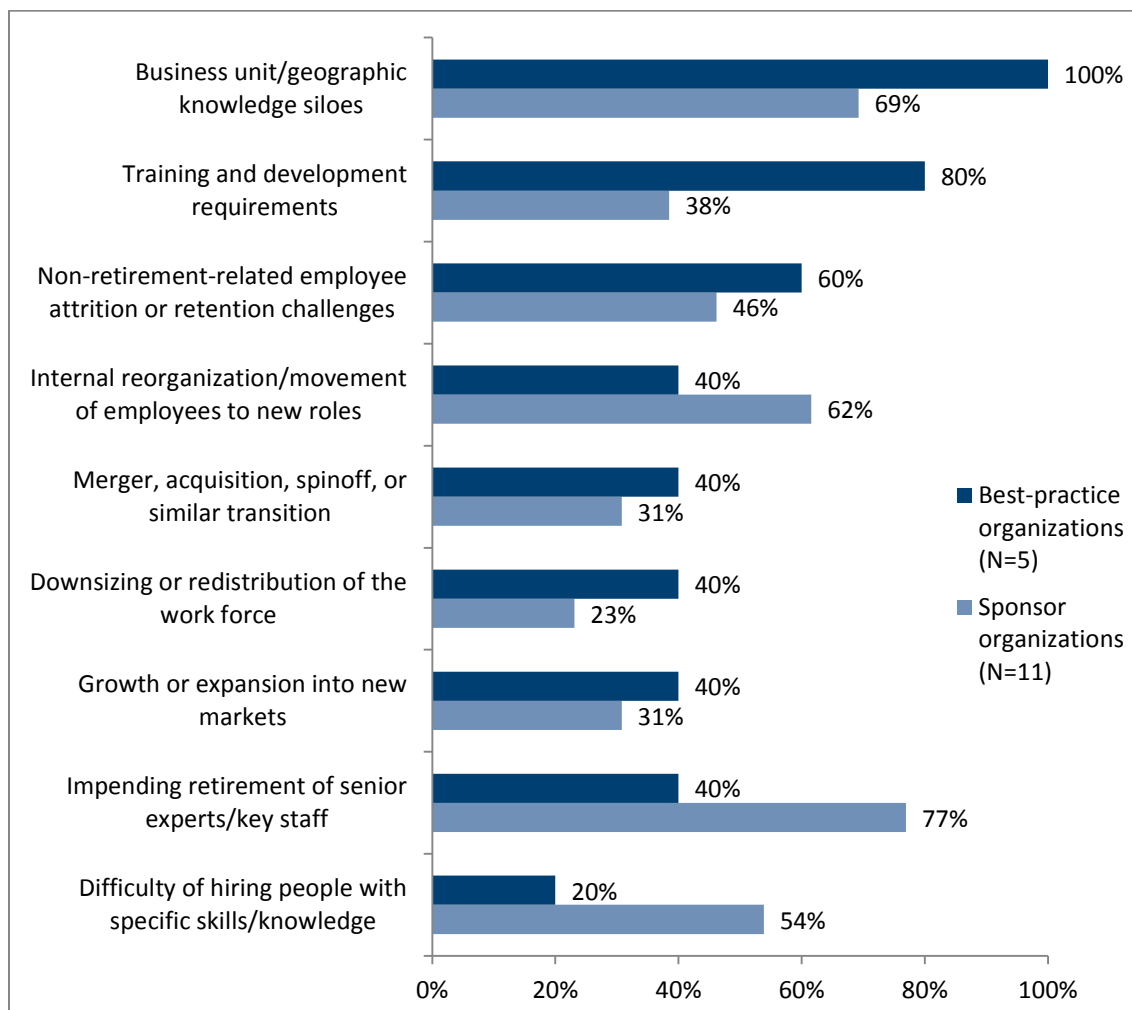


Figure 1

Clearly, the implementation of an effective knowledge capture and transfer strategy is a vital enabler of success. With solid strategies in hand, best-practice organizations are able to:

- ▶ pinpoint where to focus their efforts (e.g., R&D, sales, and engineering);
- ▶ identify key stakeholders (e.g., process owners, project managers, and end-users) to involve; and
- ▶ ascertain the other resources (e.g., funding and technology) needed to execute the strategy and meet the stated goals.

In at least three of the best-practice programs, APQC observed explicit links to the business strategy itself, including the enterprise mission and goals. These organizations can clearly define the value path from knowledge capture and transfer activities to business strategies and outcomes. This link between KM and the business strategy is how the programs get support from business leaders, and it also determines how they allocate resources and funding.

How Best-Practice Organizations Do It

The best-practice organizations in [Transferring and Applying Critical Knowledge](#) have mature knowledge capture and transfer strategies that support business continuity and enterprise strategic goals. Descriptions of these strategies follow.

LLOYD'S REGISTER: MARINE

At Lloyd's Register: Marine, a leading provider of marine classification, risk management, and certification services, knowledge retention and business continuity planning are combined into one process. The need for business continuity planning increased in 2012 when the organization decided to relocate 350 employees from its long-time London headquarters to a new Global Technology Centre in Southampton, United Kingdom. To prepare for this transition, Lloyd's Register began relying heavily on a business continuity plan, a document used to identify critical business functions and document the actions managers need to complete to ensure continuity of operations. The plan identifies which functions are at risk of losing knowledge along with any notable individuals with critical knowledge in those functions. Although the business continuity plan has been especially crucial in the context of the relocation, it existed before Lloyd's Register planned to relocate and will continue to be used as part of ongoing processes for strategic planning and KM.

Prior to developing the current business continuity plan, the KM team at Lloyd's Register worked with key stakeholders to determine what the KM vision would look like and what it should achieve. Using a benefits mapping process, the team identified seven business benefits that would accrue from enhanced knowledge retention and transfer:

1. **people and content available from one source**—providing a central portal for all technical and business organizations;
2. **technical knowledge retained**—reducing the risk of losing technical knowledge while regenerating existing knowledge;
3. **starters get up to speed more quickly**—providing new hires access to key information;
4. **risk of inconsistencies reduced**—delivering better, more standardized information to employees regardless of location;
5. **technical capability improved**—providing best practices and connecting people with the right experts;

- 6. **efficiency increased**—helping employees access technical knowledge quickly as part of their normal workflows; and
- 7. **service to clients improved**—delivering the best possible information and expertise to clients.

The team then outlined how the benefits support the broader business strategy, articulating clear ties from knowledge retention and transfer activities to overarching strategic goals. Figure 2 outlines the benefits mapping process used to make these connections.

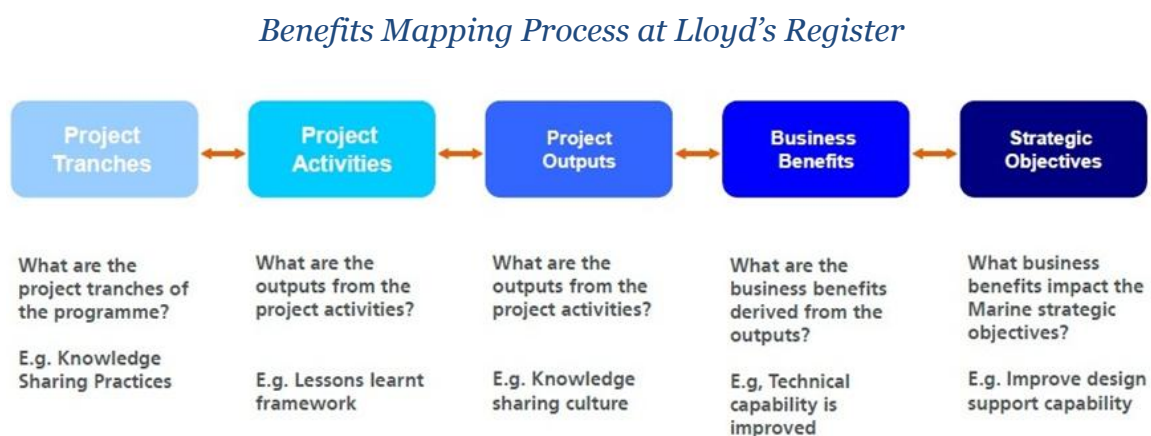


Figure 2

KRAFT FOODS

Business continuity issues are equally central to knowledge capture and transfer efforts at Kraft Foods. In 2012, Kraft Foods Group Inc. split from Kraft Foods Inc., which became a new company called Mondelēz International. The new Kraft Foods and Mondelēz have a number of business lines in common including cheese and dairy, coffee, and powdered beverages. In these areas, it was critical to ensure that each newly formed company had the knowledge it needed to maintain operations and be competitive. Any information or expertise that was historically shared between the two entities needed to be reproduced and made available in both.

In 2013, when the spinoff was complete, the new Kraft Foods decided that it wanted to proactively identify and capture at-risk knowledge so that it would be prepared for the pending retirement of senior experts as well as any future restructuring or business changes that might occur.

LOCKHEED MARTIN

At Lockheed Martin, a global security company primarily serving the defense, civil government, and intelligence markets, the knowledge capture and transfer strategy focuses on ensuring the preservation of skills and expertise needed to maintain programs and execute work for clients. The organization works on many long-term, mission-critical U.S. government and defense programs, and its clients need evidence that program teams can pass down relevant knowledge and maintain their expertise over time in order to ensure program continuity. Furthermore, Lockheed Martin sometimes competes for contracts currently held by competitors, and a key part of winning this business is showing that the project team can glean relevant knowledge from the current contract holder and transition the project with minimal disruption.

U.S. DEPARTMENT OF STATE

For the U.S. Department of State, the federal department responsible for the international relations of the United States, business continuity means providing diplomats and other employees with the information needed to support and implement U.S. foreign policy. Many of the positions within the State Department operate on two- or three-year rotations, so knowledge capture and transfer is critical to ensure continuity of operations.

ACCENTURE

As a professional services firm, Accenture considers knowledge and expertise key to its business model and therefore to business continuity. Accenture uses the term social learning to refer to its knowledge sharing program. It chose this term to focus more on the initiative's outcomes, rather than on the management of knowledge itself. The mission of Accenture's social learning program is to enable employees to learn from one another and bring the best of Accenture to its clients. The social learning team aims to connect people to the collective wisdom of the organization through documents, communities, ideation, and experts and to accomplish this outside the bounds of formal training.

WIPRO

Like Accenture, IT consulting and outsourcing firm Wipro Ltd.'s business relies on knowledge, but it is also marked by aggressive expansion and rapid turnover. For it, capturing best practices and reusable intellectual property is critical to ensure that new employees have access to the best information, intellectual property, and expertise. Business continuity at Wipro means enabling seamless knowledge exchange across departments, functions, and locations so that employees are able to speak competently about all of the organization's domains, technologies, and business parameters. Wipro sees a direct correlation between the level of knowledge available to the work force and customer satisfaction, which is one of its most important strategic business objectives.

Conclusion

A solid strategy linked to business continuity and goals provides the foundation needed for an organization to effectively capture, transfer, and reuse critical knowledge. Senior leaders are more likely to champion knowledge transfer activities, and knowledge holders and seekers are more inclined to invest the time to learn about and participate in the process. A well-articulated value proposition is particularly important to engage subject matter experts, most of whom will not carve time out of their schedules unless they perceive knowledge sharing as a meaningful contribution to the current and future success of their business areas.

For more information about how best-practice organizations identify, capture, transfer, and reuse critical knowledge, see APQC's 2013 best practices report [Transferring and Applying Critical Knowledge](#).

ABOUT APQC

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