Making Knowledge Transfer Intentional

For the past four consecutive years, knowledge transfer has been a top priority for knowledge management programs. It's not hard to see why. When organizations leave knowledge transfer to chance, they put one of their most valuable assets—critical knowledge—at risk.

Top KM Priorities

■ Early 2025 (N=332)   ■ Early 2024 (N=226)   ■ Early 2023 (N=224)

Incorporating AI/generative AI and "smart" technology
- 41%
- 27% ← New in 2024

Identifying, mapping, or prioritizing critical knowledge
- 30%
- 30%
- 32%

Transferring expert knowledge
- 22%
- 25%
- 22%

Boosting KM participation or engagement
- 21%
- 23%
- 33%

Enabling collaboration across teams/units
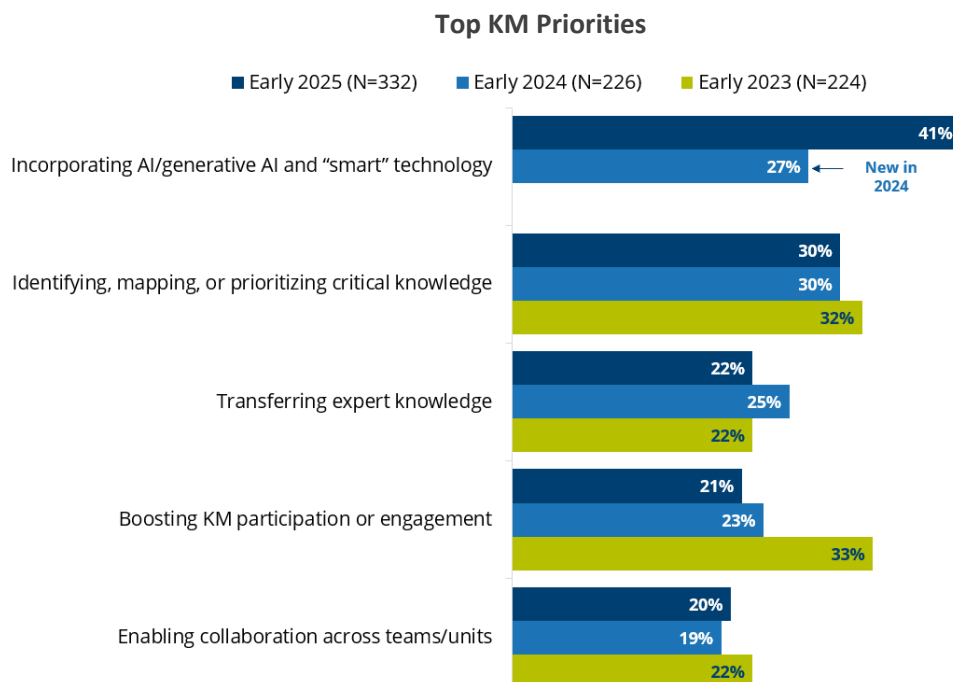- 20%
- 19%
- 22%

Figure 1

Knowledge transfer helps ensure that organizations retain their most important knowledge while getting employees up to speed faster, improving efficiency, and more. However, it takes careful and intentional planning for knowledge transfer practices to work effectively.

In this article, we:

» Explain knowledge transfer and its benefits
» Explore the approaches that organizations use to transfer knowledge
» Provide guidance for choosing the right knowledge transfer approach
» Describe common knowledge transfer challenges and effective ways to address them

What is Knowledge Transfer?

Knowledge transfer is the process of converting the knowledge inside people's heads into content, learning materials, tools, and processes that others can use, and/or directly transferring knowledge from one person to another. True knowledge flow value does not

happen until knowledge has been successfully transferred, received, and used again to bring value to an organization.

In order to make this happen, knowledge transfer needs to involve both a **source** and a **recipient** of knowledge.

» A **source** of knowledge refers to any resource that provides valuable insights or information that can be used to enhance one's understanding or skills. Books, articles, experts, and even personal experiences can all be sources of knowledge.

» A **recipient** of knowledge is any individual or group that receives information, insights, or expertise from a source of knowledge. Recipients can include employees, team members, or any stakeholders who benefit from knowledge transfer.

Drivers of Knowledge Transfer

Three broader trends are driving a sense of urgency around knowledge transfer in many organizations:

» **Business continuity**—As Baby Boomers and Generation X begin to retire at higher rates, many organizations face an increased risk of critical knowledge loss. Organizations will need to help long-tenured leaders and experts parse the knowledge they've acquired over decades, identify what is truly critical, and pass that knowledge on to new generations.

» **The pace of change**—The ongoing pace of change and the evolution of both knowledge and skillsets—especially in certain fields—also contributes to escalating concerns around knowledge transfer. To gain and retain competitive advantage, organizations need knowledge and innovation to move quickly throughout an enterprise.

» **New and emerging technologies**—The advent of Generative AI not only means that employees will need to learn new skills but also makes it increasingly difficult to pinpoint critical knowledge among the masses of data and information available.

Benefits of Knowledge Transfer

Organizations with mature knowledge transfer practices benefit in numerous ways. For example, they:

» **Get employees up to speed more quickly** by providing new hires with access to key information

» **Reduce the risk of inconsistent knowledge** by delivering better, more standardized information to employees

» **Improve technical capabilities** by providing best practices and connecting people with the right experts

» **Increase efficiency** by helping employees access knowledge quickly as part of their normal workflows

» **Improve internal and external customer service** by delivering the best possible information and expertise

Choosing the Right Approach for Knowledge Transfer

Knowledge transfer comes in many forms. It can be as simple as dropping a preexisting document into a content repository. It can also be a time-intensive affair involving interviews with subject matter experts, translation of tacit knowledge into explicit formats, and on-the-job learning by knowledge recipients. The complexity of knowledge transfer and the degree of planning required depend on the type of knowledge being transferred and the difficulty of passing it from one person to another.

As you consider the best approach to take, it's helpful to start by thinking about knowledge transfer approaches as a spectrum (Figure 2). At one end are **organic** knowledge transfer approaches that focus less on the exact sources and recipients of knowledge and more on the tools that enable knowledge to flow naturally in the course of work. Enterprise social networking, internal video libraries, and spontaneous knowledge sharing are all examples of organic approaches.

The Knowledge Transfer Spectrum

Figure 2

At the other end of the spectrum are **systematic** approaches like chartered communities of practice, formal mentoring, and after action reviews. For these approaches, the KM team typically collaborates with business leaders, managers, and subject matter experts to articulate what knowledge should enter the pipeline, exactly how it should be documented and transferred, and who should use the outputs.

Knowledge transfer approaches across the spectrum can be grouped into four broad categories, which increase in complexity from one to four as knowledge becomes less explicit and more tacit (i.e., derived through experience and harder to teach explicitly):

1. **Self-service**: Tools and systems that allow users to find knowledge or experts on their own. Internal social media tools, repositories, and enterprise search are all examples of these approaches.

2. **Process-based**: The main objective of these approaches is to embed KM directly into business processes and workflows. Lessons learned and content management are both examples of process-based approaches.

3. **Communities of practice and networks** are groups that share, learn, and are held together by a common interest topic.

4. **Transfer of best practices**: These approaches involve facilitated knowledge sharing and internal benchmarking (e.g., peer assists, knowledge elicitation and transfer).

3 Questions for Choosing Your Approach

The following three questions can help you select knowledge transfer approaches that are a good fit for each situation and need.

How easily can the knowledge be put into documents or other explicit formats?

Knowledge that can be codified in white papers, case studies, templates, or presentations lends itself to more organic transfer approaches. Knowledge that is more tacit may require a more systematic approach like formal mentoring.

Who is the intended audience for this knowledge?

The size of the audience and the extent to which recipients can be identified ahead of time will also shape the best approach to use. Most systematic approaches not only require you to identify the sources of knowledge (like experts) but also the learners who should participate in transfer activities to absorb that knowledge.

How quickly is this knowledge evolving or changing?

In general, more stable bodies of knowledge are more conducive to systematic knowledge transfer approaches because it is easier for organizations to pin down what knowledge is critical, who has it, and who needs to know it. In quickly evolving fields, the answer to these questions can shift from one day to the next. These areas lend themselves to more organic approaches.

Addressing Common Knowledge Transfer Barriers

We've found that there are five common barriers to knowledge transfer. We describe each below, along with strategies that leading organizations use to address them.

Recipients Can't Absorb New Knowledge

There is a limit to the amount of change that people can handle at any given time. If change happens too quickly, people can reach a saturation point where it becomes increasingly difficult to learn new things.

To avoid this barrier, it's important to strategically guide the size, speed, and timing of knowledge transfer projects. Speak with potential recipients and other stakeholders to ensure that you're not competing with other change initiatives and that recipients have the space to learn what needs to be learned.

Some Knowledge Is Difficult to Document and Share

A large proportion of knowledge is tacit, which can make it more difficult to document and share with others. Supporting materials like process maps can help people become familiar with a new practice, but true understanding often requires time, experience, and one-on-one instruction.

It's critical to ensure that the source adequately documents the process, including any relevant designs or diagrams. When possible, ask the source to provide the recipient with coaching and mentoring. In addition, make sure that the recipient accurately documents the 'as is' process before adoption and develops a migration plan for achieving the "to be" process.

Lack of Organizational Support

Knowledge transfer needs support in the form of leadership, advocacy, resources, and feedback to be effective. For that reason, it's critical to:

» Identify executive sponsors who are passionate about knowledge transfer and will visibly demonstrate their support.

» Make time, resources, and equipment available for implementation and have a plan for how you will provide these before you begin a knowledge transfer project.

» Design rewards and recognition to reinforce and sustain change.

The Source Is Not Motivated to Share

In most cases, the source does not inherently benefit from sharing their knowledge and practices. If transfer is difficult and leaders or the organization don't actively recognize it, sources may not be motivated to share.

Change management is critical for motivating and enabling sources to transfer knowledge. Rewards and recognition, visible support from executive leaders, and communication about the value of knowledge transfer all help to address the motivation to share.

Recipients Are Not Willing to Learn

Recipients don't always have an appetite for new learning. They may be hesitant to apply knowledge and adopt practices from outside their group, especially in organizations where knowledge is more siloed.

Trust and control are key change management variables that are critical for you to address. In addition to rewarding the source for sharing, you should reward the recipient for applying knowledge and adopting the new practice.

Key Takeaways

Disruptions from workforce churn, emerging technologies, and the pace of change more broadly all make it critical to develop effective knowledge transfer practices. For better or worse, there is no 'one-size-fits-all' strategy for knowledge transfer. Finding the right approach means considering the degree to which knowledge is explicit or tacit, the relationship between the source and recipients of knowledge, the resources needed to connect them, and more. Use the following takeaways as guideposts to consider the best approach for your organization.

» Use organic knowledge transfer approaches like internal video libraries and repositories for knowledge that can be easily codified and documented (for example, desktop procedures).

» Use systematic approaches like chartered communities of practice and formal mentoring in cases where knowledge is more tacit and difficult to document.

» Newer and/or rapidly evolving fields of knowledge are better suited to organic knowledge transfer approaches.

» It's critical to provide the right resources for effective knowledge transfer. This not only includes time and space to learn but also change management elements like rewards and recognition to motivate both sources and recipients.

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