



KNOWLEDGE Know- How

A 20-page special section on knowledge transfer, full of real-world tips from the trenches.

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To empower practitioners, organizations should formalize their knowledge transfer practices.
By Matt Alderton

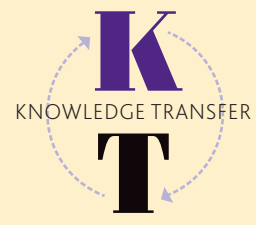
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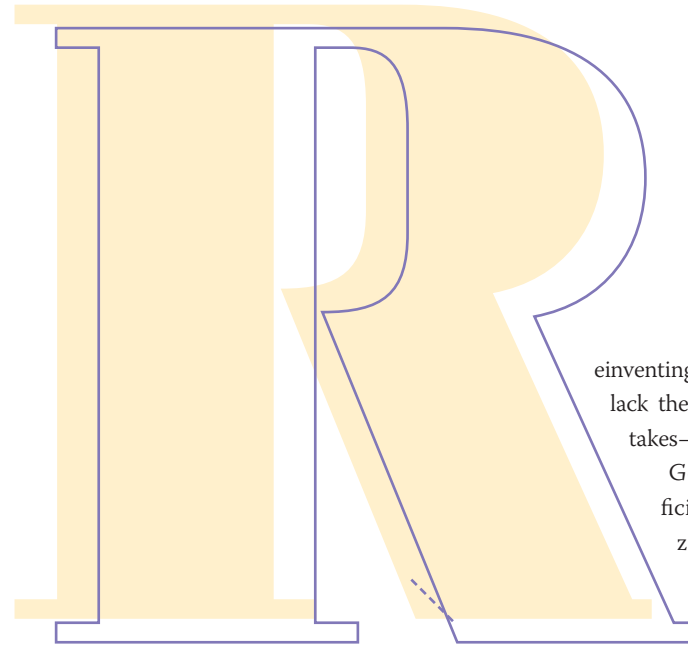


Blueprints FOR KNOWLEDGE

To empower practitioners, organizations should formalize their knowledge transfer practices.

BY MATT ALDERTON
PORTRAIT BY PEDRO GUIMARÃES

Sónia Peleja, PMP, Altran
Portugal, Lisbon, Portugal



Reinventing the wheel is a waste of resources. But when project teams lack the blueprints to replicate success—and avoid repeating mistakes—they have no choice but to start from scratch.

Going back to the drawing board is more than just inefficient. It also reduces a project's chance of success. Organizations that have formal knowledge transfer processes in place also are more likely to deliver projects on schedule (59 percent versus 41 percent) and on budget (62 percent versus 48 percent), according to PMI's 2015 *Pulse*

of the Profession®: *Capturing the Value of Project Management*.

Despite these benefits, the *Pulse* report found that only half of global organizations have a formal knowledge transfer process in place. This shortfall can cost an organization "time, money and credibility," says Tracy Vilkauskas, PMP, senior project manager, Cable One Inc., Phoenix, Arizona, USA.

"If a senior-level project manager leaves and has not been required to transition their knowledge in a structured fashion to another project manager, there is a breakdown in the effectiveness of the organization," she says. "When you have a person performing a role who does not have the necessary knowledge, it takes them longer to execute and there is a serious risk of mistakes being made that may affect team morale and overall project delivery."

A formal knowledge transfer process can prevent this scenario—and drive results. The *Pulse* report found that 75 percent of high-performing organizations have a formal knowledge transfer process in place, compared to just 35 percent of low-performing organizations. High performers successfully complete 90 percent of their projects, while low performers successfully complete only 36 percent.

PROVE THE CONCEPT

This risk is exacerbated if major team changes happen in the middle of a long-term project, says Girish Mahajan, PMP, senior project manager, Care Management International, Dubai, United Arab Emirates.

"People who worked previously on the project have gained a lot of knowledge, and it could take months or



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Closing the Global Skills Gap

The need for formal knowledge transfer processes is exacerbated by the global talent crisis. In 2014, 36 percent of employers indicated they had trouble filling jobs—the highest percentage since 2007, according to human resources consultancy ManpowerGroup.

The *ManpowerGroup Talent Shortage Survey 2014* says the crunch is being felt in both established and emerging markets. In Japan, for instance, where the median population age is 46, 81 percent of employers say filling jobs is difficult. In India, where the median population age is 27, 64 percent of employers say the same.

In established markets, the challenge reflects an accelerating loss of mature talent to retirement; in emerging markets, the difficulty stems from a surge of young talent lacking practical training and experience. And as root causes vary, so do the obstacles project managers need to overcome.

In Portugal, for instance, executive sponsors often are hesitant to create a formal knowledge transfer program because they believe employee knowledge already belongs to the organization, says Sónia Peleja, PMP, project manager, Altran Portugal, Lisbon, Portugal.

"We have been brought up understanding training almost as part of our wages," she explains. "It is usual to have 'learning contracts' where you're forced to pay the training costs to the company if you leave before a given time. What companies haven't understood is that the knowledge goes with you. There's no money in the world that can pay them back that investment."

In other environments, practitioners put up roadblocks. In especially competitive economies, senior employees avoid participating in knowledge transfer

programs for fear of being diminished or replaced by new colleagues and technologies.

"Sometimes knowledge is jumbled with power, and that creates risk for companies," says Alessandra Rodrigues Almeida, PMP, head of project and process management office, Serasa Experian, São Paulo, Brazil. "So, it is important to understand the web of power and break it, if necessary, to avoid impacting the future of the business."

But breaking the web of power is easier said than done. A good first step is creating a culture that values experience, says Tracy Vilkauskas, PMP, senior project manager, Cable One Inc., Phoenix, Arizona, USA.

"I would like to see a shift in consciousness where organizations recognize how much value these senior-level employees offer and capitalize on that by giving them opportunities to help the organization as a whole by sharing the knowledge they have," she says.

In addition to fueling a collaborative culture, organizations also must create intergenerational teams to maximize the value of knowledge transfer programs. But getting team members of all ages to work together isn't just about encouraging them to swap insider expertise and software shortcuts. It's about closing strategic skill gaps—and filling the talent pipeline.

"For me, the key is being deliberate," Ms. Vilkauskas says. "You see a gap that exists, or is about to exist, and you take specific action to ensure that the relevant knowledge base is transitioned successfully from one individual or group to another."



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—Alessandra Rodrigues Almeida, PMP, Serasa Experian, São Paulo, Brazil

even years for newer team members to get caught up," he says. "Having formal knowledge transfer policies and practices makes it possible to onboard a person into a new industry or a new project in a very short span of time, and provides relevant historical data and information to support decision-making."

But implementing these processes can be a battle against inertia. A shortage of time, resources and executive sponsorship will stall the best-planned program. To successfully build a knowledge transfer framework, an organization first must develop a culture of collaboration, says Sónia Peleja, PMP, project manager, Altran Portugal, Lisbon, Portugal.

"Knowledge transfer presupposes there is a sharing of competencies, which may have been acquired in formal ways, such as in-class training, or as a result of daily experiences, by interacting with other people, cultures or environments," Ms. Peleja says.

Regardless of the techniques used, successful knowledge transfer should be a top-down process, says Ms. Vilkauskas. She recommends project leaders and practitioners begin the building process by seeking executive sponsorship and support.

“A conversation is the starting point,” she says. “It’s a sales job, primarily. Executives like documentation presented to them in a very clear, distinct way. If you can show them the risks that become issues when knowledge transfer does not take place—if you can document for them all the dominoes that will fall, highlighting time, cost and quality—that will ring executives’ bells.”

In a previous role, Ms. Vilkauskas introduced executives and other stakeholders to the benefits of knowledge transfer by organizing a knowledge transfer “road show.” “It was a presentation that essentially ran through—from front to back—what the knowledge transfer process was, and what the benefits were,” she explains. “We presented that road show to anybody and everybody in the organization who would listen, and I think that was a great part of our success.”

A targeted messaging campaign can build the support needed to assign PMO-level resources to a strategic knowledge transfer initiative. And having a dedicated team is the best way to implement a program that will work, says Mr. Mahajan.

“Organizations need to ensure there are people who are focused specifically on knowledge transfer,” he says. “These people are the change agents who will continuously enforce the standards that are set and the best practices that are adopted. They’re the people who ultimately are accountable for making sure knowledge is transferred. In that way, knowledge transfer itself becomes a project in the organization. That’s the ideal way to approach it, because it mitigates risk and creates accountability, ownership and alignment with the goals of the organization.”



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FORMALIZE THE APPROACH

With executive sponsorship secured and change agents in place, successful knowledge transfer relies on the development and execution of specific, structured processes and practices.

“In strategic terms, it is very important to identify which knowledge you need and want to capture,” says Ms. Peleja. “When that is done, the first thing to do is to establish what methods will be used and for which purpose. This will depend on industry, age, cultural factors and, many times, on personal preferences.”

Whether information is being downloaded from senior- to junior-level employees, from the project team to the operations team, or from external to internal team members, processes should aim to make the transfer personal, says Ms. Peleja.

“It is more than organizing, creating or distributing ‘knowledge.’ It is more than sharing technical, technological or soft skills. It is sharing the whole experience,” she says.



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Peer presentations—conducted remotely or in person—are a common and effective knowledge-transfer tactic used by Vodafone Group Services in Düsseldorf, Germany, according to Mariano Blaya, PMI-SP, PMP, a service transition and quality manager.

At Vodafone, he recently developed a formalized peer presentation program to facilitate the flow of knowledge from external system integrators in India to an internal operations team in Egypt. So far, success has been a function of meeting frequency, advanced scheduling, clear communication and thoughtful documentation.



“The process of refinement and getting acceptable quality took us roughly two to three months, running two to three knowledge transfer sessions per week,” explains Mr. Blaya, who says persistence and consistency were key. “We had to keep pushing back and keep trying, but finally I think we have a fairly stable process that’s working well.”

Scheduling formal sessions every week can be a drain on resources, but the payoff is worth the investment, says Ms. Vilkauskas.

“If you schedule your time, and you have a framework for what you want to accomplish, it can be very effective.”

VALIDATE THE RESULTS

Without the rapid onboarding produced by successful knowledge transfer, organizations risk interrupting project continuity when project team changes are made. These interruptions can lead to additional turnover, informational attrition, low performance, inconsistent methodologies and operational gaps.

“The risk could be very strong for a company—especially in a competitive market—if its essential knowledge is concentrated in a small group of

people,” says Alessandra Rodrigues Almeida, PMP, head of project and process management office, Serasa Experian, São Paulo, Brazil.

Once knowledge has left the organization, there’s no getting it back. To reduce the effects of brain drain as quickly as possible, organizations must measure the effectiveness of their knowledge transfer programs—and be ready to make changes when gaps persist.

“Metrics are incredibly important,” Ms. Vilkauskas says. “You must develop criteria for measuring whether or not the knowledge has actually been transferred.”

Metrics might reflect the number of knowledge transfer sessions held, how valuable the participants found the knowledge transfer sessions or the project success rate of knowledge recipients. But whichever metrics are used, they always must be tracked against clear objectives to ensure that results are improving with time.

“I favor, whenever possible, the assessment of the approach to the problem that demonstrates there is an understanding of what is asked,” Ms. Peleja says. “It is mandatory to establish the exact goal we are aiming for to be able to then determine the success of the knowledge transfer—and that is as important as measuring the results afterwards.” **PM**

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Explore more findings from PMI’s 2015 *Pulse of the Profession*®: *Capturing the Value of Project Management* by downloading the full report at PMI.org/Pulse.

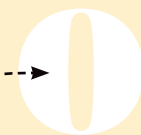
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Living Memory

When formal knowledge transfer practices come up short, a mentor can save the day.

By Alma Bahman



Organizations tend to approach mentorship as a career development tool. But it can be an effective way to promote and facilitate knowledge transfer as well. When practitioners take on new projects, they may not always know where to look for relevant lessons learned. Partnering with experienced colleagues can help practitioners find the organizational knowledge that will drive project success.

Darline Giraud, project manager at global engineering and technology consulting firm Alten SA in Paris, France, works with organizations with varying degrees of project documentation. When a client’s formal knowledge transfer system is incomplete—a situation Ms. Giraud encounters frequently—her mentor functions as an invaluable compass to point her in the right direction.

“I had a situation where the documented information in the knowledge transfer system was not up-to-date, but I had no other source of information to make estimates for a procurement contract,” she

says. So Ms. Giraud turned to her mentor for help before providing numbers to upper management. “I reviewed the data with my mentor, who helped me identify misinformation and advised me to use benchmarking to solidify my estimates,” she says.

ORAL HISTORY

When Jody Pollack, PMP, former senior program manager, Ricoh Co. Ltd., Atlanta, Georgia, USA, was left to his own devices to get up to speed on a new project, he called on a mentor for crucial advice. Mr. Pollack took over the reins from another project manager who had been on the project since the beginning.

“The project manager and I met for about 10 minutes before my first weekly status meeting with the customer,” Mr. Pollack says. “We went our separate ways after the meeting, and a few days later the project manager told me he was too busy with his new client to fill me in. I was on my own.”

Without formal documentation or any other system to look to, Mr. Pollack turned to another source of knowledge. “My mentor suggested I reach out to other members of the team and learn as much as possible from them regarding the history of the project and to gain insight on the customer’s team, especially their personalities.”

Ms. Giraud faced a similar challenge on an office telephone upgrade project she managed. A document stated that the previous upgrade project deployed and upgraded 30 phones in two days—but an important piece of information needed to replicate those results was missing. The staff working in the office had the tendency to move to different desks, and the updated employee seating map was nowhere to be found. This caused a problem, because Ms. Giraud’s team needed to confirm that every staff member was in the right location and available at the right time. “Not having that detail impacted the execution of the project plan,” Ms. Giraud says.

After a rough ending to the project, Ms. Giraud turned to a mentor to help her glean lessons learned. The important takeaway:

“Follow up on the information provided in documentation with a face-to-face meeting with the people who were involved in the project,” she says.

A GUIDING LIGHT

In the case that there are a few holes in a team’s knowledge transfer practices, conferring with a veteran practitioner can provide a patch. Mr. Pollack says his mentor helped him overcome what he sees as a common problem: when the process

becomes “a rapid-fire transmission of information that has little or no context that the recipient can relate to,” he says. Knowledge recipients might nod in agreement and think they understand the information, but that’s rarely true, Mr. Pollack says.

His mentor’s advice: Provide context. “Instead of blasting team members with information, my mentor suggested I work out a form of knowledge transfer that allows them to learn in contextual ways,” Mr. Pollack says.

Mentors also can offer guidance on how to motivate team members to follow formal knowledge transfer processes. When Mr. Pollack sought advice about how to get his team to prioritize documenting lessons learned, his mentor offered a valuable leadership lesson.

The key, he said, “is to know them as people and understand what really drives them as people,” Mr. Pollack recalls. “There are members on the team who know more than you. To properly leverage their energies, you have to step back and be willing to recognize their talents.” **PM**



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