Better Knowledge-Sharing: Fill The Dry Knowledge Well With These Practices

Here are a variety of quick and easy ways to share important business information each generation needs to know.

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Today, a popular need of organizational leaders is how to quickly identify, capture and reuse information from employees who are retiring, or about to do so, for these people have industry expertise and can make it quickly available to those who need it.

The ability to quickly access the right information can improve competitive position, promote innovation, reduce rework and errors, and increase the speed to identify new opportunities. Unfortunately, searching for information (such as proven practices, lessons from prior unsuccessful attempts, tips and techniques, documented procedures and, most important, experience and intuitive expertise locked in the heads of individuals) can take far too much time.

As the crew shift change continues—Baby Boomers retire in mass and few Generation X and Y talent enter the oil and gas industry—leaders have an opportunity to manage this shift by leveraging the latest information-sharing technologies and methods. To meet business strategy, many leaders crave the ability to "google like Google." They desire to create a deep reservoir of information that replenishes itself and deploy methods and tools that will enable each generation to find the right information within a few clicks.

Too often, organizations rely on only one method, such as launching communities of practice, conducting after-action reviews, and promoting the use of best practices. Or, they use a limited number of technologies such as social networking tools, content repositories and search engines, and use the same solution across the board. This tends to produce dry knowledge wells.

A savvy strategy begins with understanding the needs of the internal talent group: Who has the information and who needs it? Next is meeting unique requirements by implementing several methods and technologies to create custom solutions. Characteristics of the solution should emulate popular knowledge-sharing practices that occur outside the organization.

Understanding generational issues

"What we've got here is a failure to communicate."
--Strother Martin, *Cool Hand Luke*, 1967 film starring Paul Newman

Communication problems are as old as human history. Bridging gaps is a continual challenge, and industry leaders need to know how to capitalize on overcoming those gaps.

Within the oil and gas industry (as well as in other industries), there are four generations of talent: Traditionalists (birth years 1925-1945), Baby Boomers (1946-1965), Generation X (1966-1980) and Generation Y (1981-2000). Since the 1990s, professional journals have alerted oil and gas leaders that the Baby Boomers, now the largest percentage of the workforce, are exiting the workforce at an alarming rate. The potential consequences include:

--**Increased competition for talent.** Due to the decrease in skilled talent following the retirement of the Traditionalists and Baby Boomers, competition for workers with required professional degrees and experience will increase.

--**Shifting geography.** Technology enables talent to work from anywhere and teleworking is becoming more commonplace; therefore, organizations will be able to source talent globally. This shift will affect organizational communication, strategy and business processes.

--**Shifting generation.** The corporate leaders of tomorrow will most likely be talent from Generations X and Y. Currently, organizations are balancing the activities of retiring two groups and preparing the organization for two others, while not neglecting any.

--**Aging workforce.** A majority of Baby Boomers are predicted to exit the workforce by 2015 and are followed by a much smaller group of talent, Generation X. In addition, the next generations of talent have different learning styles, communication preferences and work/life balance requirements than their predecessors. To recruit, retain and develop the next generation of talent, organizations must recognize and adapt to these styles.

--**Lost information and tacit knowledge.** As Traditionalists and Baby Boomers exit organizations, some for the last time, so will their communal know-how—their tacit knowledge—especially if it has not been adequately identified, captured, codified and stored in corporate knowledge repositories.

--**Preparing and training talent.** The fact that Traditionalists and Baby Boomers are retiring does not mean that they will not re-enter the workforce in some capacity, such as starting a new career, or working as a consultant or part-time employee. In some cases, organizations will be able to leverage veteran expertise in this way. As a result, organizations will need to update the skills of these workers, or train them along with other new hires. Thus, learning/training departments may simultaneously have to train several generations, each having distinctly different learning styles. This can perplex learning organizations that do not understand the needs of each generation.

Bridging generational gaps to improve knowledge management

"When you're 17 years old, green and inexperienced, you're grateful for any guidance and direction you can get."
--Christina Aguilera, pop singer

Leaders who recognize and respond to generational communication and learning commonalities and differences, can bridge gaps and prepare for the future.

Different generations favor different learning styles. Traditionalists and Baby Boomers usually prefer face-to-face, classroom and instructor-led training activities. In contrast, Generations X and Y may resist formal training sessions and prefer to connect to people informally and quickly search all information sources. Technology tools, such as handheld devices and social-networking sites, facilitate their fast connections to information.

Traditionalists and Baby Boomers tend to communicate using formal and personal methods, such as writing e-mails, meeting face to face and holding conference calls. In contrast, Generations X and Y usually like just the right amount of information, when and where they need it, such as sending abbreviated text and instant messages, and meeting via online chat sessions.

When information exchange is effective, employees seeking information receive what they need—a knowledge gem. Unfortunately, during communication, valuable information is often lost because the organization does not have an easy-to-use method of identifying and systematically collecting and depositing gained knowledge into a repository.

Capturing critical knowledge

"Any customer can have a car painted any color he wants, so long as it is black."

--Henry Ford

Because the talent of today and tomorrow is multi-generational, a one-size-fits-all approach to information capture, collaboration and reuse does not work. What works are multiple approaches that consider each member of the audience.

Now that the typical characteristics of each generation group is understood, the next step is to understand the two phases of information flow: capturing it and accessing it for re-use. Let's explore two key steps to capturing it.

--**Step One: Understand and identify knowledge that fuels the organization.** What information, knowledge and expertise is valuable to the organization? Some businesses are uncertain and attempt to capture all information regardless of value. A better practice is to identify critical business processes and their associated performance targets across the organization's value chain. In other words, identify the most important business activities that yield success, are vital to avoid failure, and identify where information gaps exist.

Analyzing key processes, creating knowledge maps and interviewing stakeholders will lead to key process identification. The output will assist leaders in understanding where the information is located, who has it and the prerequisites for information capture.

--Step Two: Capture what's important. Information and know-how are scattered throughout an organization in e-mails, individual and networked hard drives, binders containing operating procedures and training manuals, SharePoint or other Internet sites, conversations around water coolers, and within people's heads.

Knowledgeable organizations use a variety of capture activities such as on-the-job team learning processes before, during and after major activities and are supplemented, when relevant, through a series of individual interviews.

"Learning before doing" is supported by a peer-assist process, which targets a specific challenge, imports knowledge from people outside the team, identifies possible approaches to address obstacles and new ideas, and promotes sharing of information and knowledge with talent through a facilitated meeting.

A U.S. Army technique called After Action Reviews involves talent in "learning while doing" by answering four questions immediately after completing each key activity: What was supposed to happen? What actually happened? Why is there a difference? What can we learn from it?

At the end of a given project or accomplishment, a process called a Retrospect encourages team members to look back at the project to discover what went well and why, with a view to helping a different team repeat their success and avoid any pitfalls.

A critical component of capture technique requires an effective method to record information that is comfortable for the information providers and appeals to the information seeker. For example, a Baby Boomer's preferred sharing method could be a written report. In contrast, a Gen Y would have no interest in such and would ignore it.

This issue raises the importance of using a variety of communication methods as well as an opportunity to emulate information and knowledge-sharing practices that occur outside the organization.

Social-networking sites such as Facebook, Wiki sites such as Wikipedia, and video-sharing sites, such as YouTube, are popular tools for capturing information, connecting with people, sharing ideas, searching for information and viewing content. Such sites are popular, free and used by each generation. Instead of inventing something new, organizations can transfer popular features from public sites into the design and functionality of corporate tools.

For example, attaching a webcam to a laptop or using a smartphone instantly equips anyone with just-in-time ability to capture information, especially dialogue and images that are challenging to document. A handheld production studio allows for ad hoc or planned capture of interviews with experts, after-action reviews, safety procedures, an equipment repair procedure, etc.

Uploading multimedia files (sound bites and video clips) to a knowledge repository creates a powerful capture and sharing opportunity. The "YouTube" approach makes it possible for any employee to post a video to a corporate site so that any team member can watch it instantly. "Nu-tube" is the name of a concept that a nuclear energy company gives its effort.

Launching pop technology is "hip" when end-users are engaged, needs are understood and the solution meets their requirements.

Make Information Accessible Quickly and Easily

"I try to learn from the past, but I plan for the future by focusing exclusively on the present. That's where the fun is."
--Donald Trump

With a plan now for perpetually capturing valuable information, people must be enable to access and use it. Two steps help to achieve success here. The first is to leverage technology to visually present information. The second is to involve end-users in the design of the sharing process. The following case study describes these two steps in action.

Recently, a U.S. pipeline service company realized that critical information trickled throughout its business unit. The increasing inability of talent to readily tap information sources sharply diminished the value of stored resources. The service company encountered several challenges to make information available.

The overwhelming amount of information to capture, organize, store and manage caused employees to spend days (then) versus minutes (now) searching data.

A document repository contained unmanaged versions and uncontrolled copies of files scattered in network file shares, laptops, intranet sites, CDs, flash drives and filing cabinets.

Other challenges were increasing regulatory constraints, litigation and business-continuity issues, and the rising need to capture "know how" from retiring staff.

Considering generational changes as an opportunity to plan for the future and social-networking tools as an opportunity to innovate, leaders acted. The result is "e-discovery," a solution that increases the speed to find reporting information from across disparate business units, regulatory-compliance improvements and business-performance enhancements.

Solution highlights include preserving content on an enterprise level versus only at an individual level, implementing a self-service information portal, facilitating contextual and "smart" search, and reducing administrative costs of managing paper records.

The method of designing this solution contributed to its success. The e-discovery design team:

--Identified the valuable information needed to comply with legal requirements,

--Understood learning, technology and communication preferences of each generation,

--Devised methods to allow users to share and access information in multiple formats and

--Designed a tool that emulates features of popular social-networking sites (easy, visual presentation of information, collaboration, smart search and dashboards).

The e-discovery impact on the pipeline business segment includes preparing litigation-status reports in one step versus multiple steps; retrieving archived documents in minutes versus days;

eliminating risks associated by damage to paper-based files; reducing employee frustration of not finding who or what they need; and serving as a solution model for re-use within the enterprise.

And most importantly this method helped all generations of talent quickly find the right information when they needed it, so that they can perform their job.

“Diamonds are forever.”
--De Beers ad

Information can be a valuable organizational asset when people can quickly recall where it is stored. Fortunately, organizations have an abundance of internal information sources: documents, expertise, lessons learned, best practices and the like. Unfortunately, waves of experts are leaving or retiring, usually without depositing their rich knowledge or revealing the location of information “gems” critical to performing business processes.

Leaders can respond by providing a variety of communication and learning methods, leveraging popular social-networking technologies, and embracing the uniqueness of each generation. The impact for the organization can be a rich field of valuable information that continuously replenishes itself.

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