

Managing Talent Risk Through Knowledge Transfer

METHODICAL, MEASURABLE, AND CLEAR

Ever struggled with ...

- Retiring workers with unique knowledge
- Onboarding the next generation
- Lack of role clarity after a reorganization or merger
- Transitioning from legacy to new systems
- Consistency in your global workforce
- Transferring work offshore
- What else?


Talent Risk Management

A hand in a dark suit jacket pointing forward, set against a green-tinted world map. A network of glowing yellow nodes and thin white lines is overlaid on the map, suggesting global connectivity and technology.



Do you have the right people with the right skills to execute your strategy 1-3 years from now?

| Team A | Silo A | Silo B | Silo C | Silo D | Silo E | Silo F |
|----------------|--------|--------|--------|--------|--------|--------|
| Team Member 1 | | | | | | |
| Team Member 2 | | | | | | |
| Team Member 3 | | | | | | |
| Team Member 4 | | | | | | |
| Team Member 5 | | | | | | |
| Team Member 6 | | | | | | |
| Team Member 7 | | | | | | |
| Team Member 8 | | | | | | |
| Team Member 9 | | | | | | |
| Team Member 10 | | | | | | |


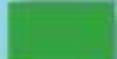


| Team A | Silo A | Silo B | Silo C | Silo D | Silo E | Silo F |
|----------------|--------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| Team Member 1 | | | | | | |
| Team Member 2 | | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated | |
| Team Member 3 | | | | | | |
| Team Member 4 | | | | | | |
| Team Member 5 | | | | | | |
| Team Member 6 | | Expert to be Replicated | | | Expert to be Replicated | Expert to be Replicated |
| Team Member 7 | | | | | | Expert to be Replicated |
| Team Member 8 | | | | | | |
| Team Member 9 | | | | | | |
| Team Member 10 | | | | | | Expert to be Replicated |

 Expert to be Replicated

| Team A | Silo A | Silo B | Silo C | Silo D | Silo E | Silo F |
|----------------|------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| Team Member 1 | | Consistent with Expert | Consistent with Expert | | Consistent with Expert | |
| Team Member 2 | | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated |
| Team Member 3 | | Consistent with Expert | Consistent with Expert | | | |
| Team Member 4 | | Consistent with Expert | | | | |
| Team Member 5 | | | | | Consistent with Expert | |
| Team Member 6 | Consistent with Expert | Expert to be Replicated | | | Expert to be Replicated | Expert to be Replicated |
| Team Member 7 | | Consistent with Expert | Consistent with Expert | | Consistent with Expert | Expert to be Replicated |
| Team Member 8 | | | | | | |
| Team Member 9 | | Consistent with Expert | Consistent with Expert | | Consistent with Expert | Consistent with Expert |
| Team Member 10 | | Consistent with Expert | Consistent with Expert | | Consistent with Expert | Expert to be Replicated |

 Expert to be Replicated
 Consistent with Expert

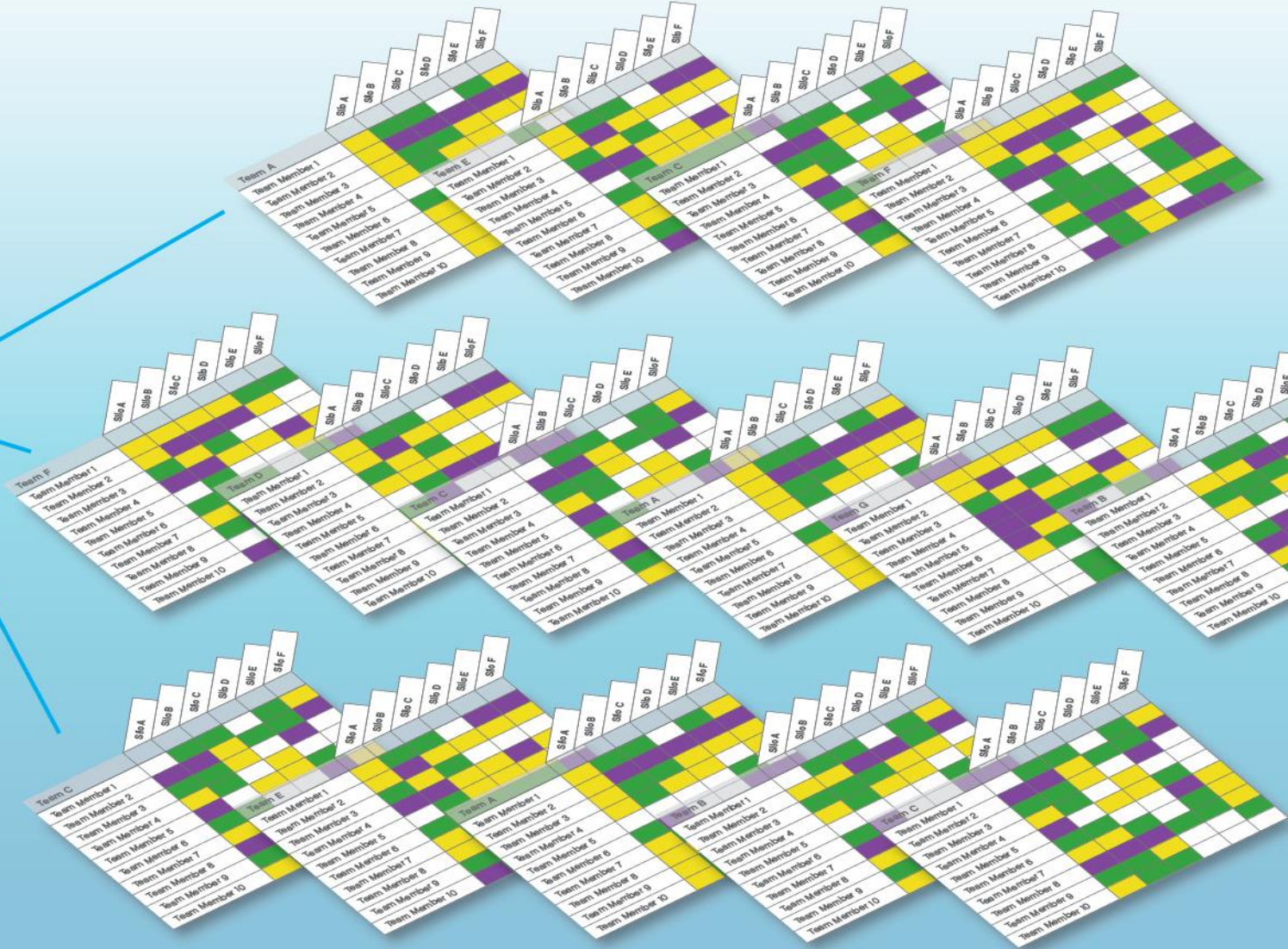
| Team A | Silo A | Silo B | Silo C | Silo D | Silo E | Silo F |
|----------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Team Member 1 | Actively Learning | Consistent with Expert | Consistent with Expert | Not Working in that Silo | Consistent with Expert | Actively Learning |
| Team Member 2 | Actively Learning | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated |
| Team Member 3 | Actively Learning | Consistent with Expert | Consistent with Expert | Actively Learning | Actively Learning | Actively Learning |
| Team Member 4 | Actively Learning | Consistent with Expert | Actively Learning | Actively Learning | Not Working in that Silo | Actively Learning |
| Team Member 5 | Not Working in that Silo | Not Working in that Silo | Not Working in that Silo | Not Working in that Silo | Consistent with Expert | Not Working in that Silo |
| Team Member 6 | Consistent with Expert | Expert to be Replicated | Not Working in that Silo | Not Working in that Silo | Expert to be Replicated | Expert to be Replicated |
| Team Member 7 | Actively Learning | Consistent with Expert | Consistent with Expert | Not Working in that Silo | Consistent with Expert | Expert to be Replicated |
| Team Member 8 | Actively Learning | Actively Learning | Actively Learning | Actively Learning | Actively Learning | Actively Learning |
| Team Member 9 | Actively Learning | Consistent with Expert | Consistent with Expert | Not Working in that Silo | Consistent with Expert | Consistent with Expert |
| Team Member 10 | Actively Learning | Consistent with Expert | Consistent with Expert | Not Working in that Silo | Consistent with Expert | Expert to be Replicated |

-  Expert to be Replicated
-  Consistent with Expert
-  Actively Learning
-  Not Working in that Silo

| | Silo A | Silo B | Silo C | Silo D | Silo E | Silo F |
|----------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Team A | | | | | | |
| Team Member 1 | Actively Learning | Consistent with Expert | Consistent with Expert | Not Working in that Silo | Consistent with Expert | Actively Learning |
| Team Member 2 | Actively Learning | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated |
| Team Member 3 | Actively Learning | Consistent with Expert | Consistent with Expert | Actively Learning | Actively Learning | Actively Learning |
| Team Member 4 | Actively Learning | Consistent with Expert | Actively Learning | Actively Learning | Not Working in that Silo | Actively Learning |
| Team Member 5 | Not Working in that Silo | Not Working in that Silo | Not Working in that Silo | Not Working in that Silo | Consistent with Expert | Not Working in that Silo |
| Team Member 6 | Consistent with Expert | Expert to be Replicated | Not Working in that Silo | Not Working in that Silo | Expert to be Replicated | Expert to be Replicated |
| Team Member 7 | Actively Learning | Consistent with Expert | Consistent with Expert | Not Working in that Silo | Consistent with Expert | Expert to be Replicated |
| Team Member 8 | Actively Learning | Actively Learning | Actively Learning | Actively Learning | Actively Learning | Actively Learning |
| Team Member 9 | Actively Learning | Consistent with Expert | Consistent with Expert | Not Working in that Silo | Consistent with Expert | Consistent with Expert |
| Team Member 10 | Actively Learning | Consistent with Expert | Consistent with Expert | Not Working in that Silo | Consistent with Expert | Expert to be Replicated |

-  Expert to be Replicated
-  Consistent with Expert
-  Actively Learning
-  Not Working in that Silo
-  Risk

DIVISIONS



Big Picture

- 1) In order of priority, who are the (internal and/or external) customers or customer segments we serve?
- 2) What are the products or services we currently provide, and which ones, if any, need to change as we implement the current strategy?
- 3) With whom (and in what priority) do we partner in delivering our products or services?
- 4) In order of priority, who are our competitors, why is each considered a threat, and what can we learn from them?
- 5) How do we currently measure our success, and how might that change in the future?
- 6) What is the relevant history that affects current strategy?
- 7) Which external trends or issues (such as market, economic, societal, political, or environmental factors) are important to our strategy?
- 8) How does our organizational structure support our strategy, and how does our team fit into it?
- 9) What are three things our unit is doing to support the strategy?

Knowledge Transfer

Methodically replicating the expertise, wisdom and tacit knowledge of critical, “chosen” professionals in the heads and hands of their co-workers.

| Team A | Priority | Silo A | Silo B | Silo C | Silo D | Silo E | Silo F |
|----------------------|----------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | | 1 | 2 | 1 | 2 | 2 | 3 |
| Team Member 1 | | Actively Learning | Consistent with Expert | Consistent with Expert | Not Working in that Silo | Consistent with Expert | Actively Learning |
| Team Member 2 | | Actively Learning | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated | Expert to be Replicated |
| Team Member 3 | | Actively Learning | Consistent with Expert | Consistent with Expert | Actively Learning | Actively Learning | Actively Learning |
| Team Member 4 | | Actively Learning | Consistent with Expert | Actively Learning | Actively Learning | Not Working in that Silo | Actively Learning |
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| Team Member 6 | | Consistent with Expert | Expert to be Replicated | Not Working in that Silo | Not Working in that Silo | Expert to be Replicated | Expert to be Replicated |
| Team Member 7 | | Actively Learning | Consistent with Expert | Consistent with Expert | Not Working in that Silo | Consistent with Expert | Expert to be Replicated |
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-  Risk

Skill Development Plan (SDP)

| Skill | Sequence | Test Questions | Date | Resources |
|------------------------------|----------|-----------------|------|----------------------------------|
| Write a... | 1 | 1, 2, 3, 5 | 5/10 | specific document at location... |
| Design a... | 2 | 1, 2, 3, 8 | 5/17 | formal training date |
| Build a relationship with... | 3 | 3, 4, 7, 8, 14 | 5/19 | name of mentor |
| Lead...meeting | 4 | 1, 2, 9 | 5/25 | specific template |
| Troubleshoot... | 5 | 2, 5, 7, 14, 20 | 5/25 | samples at location... |

Effective Knowledge Transfer

- Right expert is transferring the right knowledge
- Apprentice is clear and in the driver's seat
- Customizable for various backgrounds and needs
- Measurable so everyone knows success
- Date-driven including time carved out to hit the date
- Supported with guidance on how to execute

Questions?