

NEW Manufacturing Alliance
TALENT RISK MANAGEMENT - THE CHANGING WORKFORCE MEETING MINUTES
Forsite Benefit Partners LLC – Green Bay, WI
Tuesday, August 27, 2019 - 8:30 AM

ATTENDEES: Linda Bartelt-NEW ERA, Brandon Buchholz-Heartland Label Printers, Michelle Froehlke-R&R Insurance, Mark Hatzenbeller-WMEP, Chris Linn-A-Tech, Mike Masar-Georgia-Pacific (Retired), Chad Massner-R&R Insurance, Jon Meulemans-von Briesen & Roper, Will Robinson-Forsite Benefit Partners, Rose Weiler-WS Packaging, Ann Franz-NEWMA, Debbie Thompson-NWTC

KNOWLEDGE TRANSFER PROGRAM PRESENTATION BY TRANSITION PATH, INC.

Transition Path is a Toronto based company dedicated to knowledge management as it relates to employees who leave an organization and take their knowledge with them. The company worked with Harvard in developing the program and has many large manufacturing companies using their services, including GE. Organizations generally don't apply consistent methods, so they experience varied outcomes that impact productivity and customer experience.

Transition Path has many examples of how to share information with a successor. To begin, they determine the order and condition of work within a role. They determine aspects of the role that could be discontinued and share implications of discontinued tasks. Knowledge gaps are identified, while working to increase productivity.

CORE BENEFITS

BroadScope captures employee knowledge in an efficient, objective and timely manner, providing an organized view of roles and responsibilities. It extracts the framework of knowledge from key employees and experts. A BroadScope document looks like a mind map and reinforces business fundamentals.

- Best practice performance criteria
- Employee performance behavior
- Unessential tasks/duplication
- Out of scope job responsibilities
- Repositioning functional role components

Detailed Discovery probes deeply for key insights and beliefs learned over time through experience.

- Succession planning and career development planning
- Critical influencer points
- Fortification of working processes
- Employee lifecycle management & productivity

PDM (Participatory Decision Making) is focused on engaging your experts to advance a repeatable method with a defensible recommendation. These sessions are conducted remotely, as individual interviews.

- Complex decision making processes
- Critical relationship mapping and outages
- Capability and skills gaps
- Operational process limitations
- Workload distribution impact innovation activities

Members agreed to continue to explore knowledge transfer with Transition Path, in addition to researching other companies that offer similar services. Ann will reach out to Transition Path to propose doing two pilot projects at a discounted rate. A case study could be provided. Knowledge transfer can be a topic at the 2019 Manufacturing First Conference and/or the March 2020 full membership meeting.

RETIREMENT INTENTIONS SURVEY EXECUTIVE SUMMARY & INITIATIVES

Ann distributed the executive summary of the survey. She will finalize the executive summary, utilizing members' comments and recommendations.

The Task Force would like to host a retirement transitions seminar in which experts would discuss:

- **finances** (budgeting, saving, protecting assets, social security, tax considerations, Medicare, estate planning, etc.)
- **housing** (where to live, downsizing, snow birding, etc.)
- **health** (protecting your most important asset)
- **use of time** in retirement (hobbies, volunteering, travel, social interactions, etc.)
- **employment** (part time, seasonal, consulting, how to set up at LLC, staffing agencies, etc.), overview of company retirement benefits, transition and work options, etc.)

Employees and their significant other will be invited. The program will be offered throughout the region. There will need to be some customization, due to companies having different resources available for retirees.

The Task Force is also interested in working on a Hall of Fame talent pool of retired individuals that are no longer employed at their company.

2019 – 2021 STRATEGIC INITIATIVES

Aging Workforce – Continue looking at knowledge transfer. Offer retirement transitions seminars.

Diversity (focus on females in manufacturing) – Only 34% of STEM occupations are filled by females. Further investigate why females pursue other occupations.

Organizational Culture – Onboarding and hiring to the culture and how it relates to retention. Learn why people leave (especially within 90 days from hire) *or* stay at an organization.

ENCOURAGING WOMEN TO PURSUE A MANUFACTURING CAREER

Tabled for the 9/24/2019 meeting.

NEXT MEETING DATE/TIME/LOCATION/AGENDA

The next Talent RISK Management meeting will be on Tuesday, September 24, 2019 at Heartland Label Printers (Little Chute) 8:30 to 10:00 a.m. Agenda:

- ✓ Knowledge Transfer
- ✓ Retirement Intention Initiatives
- ✓ Encouraging Women to Pursue a Manufacturing Career
- ✓ Next Meeting Date/Time/Location/Agenda