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Capturing Butterflies and Making Them Talk

Overcoming Four Critical Challenges of Transferring Knowledge Across Generations

by Susan Stewart

Knowledge transfer is a skill like basketball or brain surgery. If companies want to benefit from the collective wisdom their employees develop, they must understand that knowledge transfer can be taught – and it can be learned.

In theory, knowledge transfer is the unselfish sharing of experience and insight between the generations as those enjoying the maturity of their careers seek to bestow their hard-earned wisdom on the eager apprentices, who will carry on their corporation's proud traditions.

In practice, it's a little different.

- It's a grumpy middle-manager pontificating to a bored 27-year-old who just wishes the old man would shut up so he could Google the answers and get on with the job.
- It's a senior executive who has no desire to tell anybody how she does what she does—because if she did, the company wouldn't need to hire her as a consultant down the road.

Despite obstacles, such as the radically different learning styles and motivators each generation brings to the game, *knowledge transfer can be learned—one way or another. What follows are four critical truths about knowledge management and knowledge transfer (KT).

* When making generalizations about any group, in this case different generations, a few cautions are warranted. First is the danger of overgeneralization. Generalizations about generations highlight broad trends. One will still find many differences within a generation just as there are between generations.

1. People Often Need To Be Cajoled, Bribed and Tricked into Transferring Knowledge

Teaching, learning—transferring knowledge sounds an awful lot like school. Plus, it takes time, and nobody has enough of that, not to mention the humility to learn and the willingness to teach . . .

Enough. If you ruminate too long on all the factors stacked against KT, you'll just crawl back into your silo, holding onto your specific, unique skill set like a security blanket, and fall into a deep, unproductive corporate sleep.

“Unfortunately, coercion still remains the tool of choice when it comes to knowledge transfer.”

Gaurav Rastogi

Associate Vice President and Head
Infosys Learning Services

Coercion needn't mean strapping a retiring executive in a chair, shining a light in her face, and torturing the goods out of her—that could work, but the legal costs of the lawsuit would flatten your ROI. So, barring physical force, how do you convince a senior employee that he wants to share his knowledge?

You make it:

- highly desirable
- painless
- unavoidable

Creating Incentives

One of the most sophisticated organizations in terms of knowledge management is the U.S. Army. It's known for leadership development, knowledge transfer, the whole thing. But think about the incentive: avoiding death. Those of us who make widgets must find other motivations.

There are three incentives to provide an impetus for knowledge capture and transfer:

- recognition—you get a pat on the back
- reciprocity—you get payback for being helpful
- altruism—you are just naturally a wonderful human being

Still, many forces conspire against its success:

- Variances in learning styles among the generations. Boomers learned in linear, face-to-face, verbal fashion, while youngsters (Gen-X, Gen-Y) learn in non-linear, visual, virtual fashion. It's all about the computer, yes, but it's also about the changing role of authority. Older workers don't mind being lectured, and they like abstractions and lots of “context,” while younger workers don't care about the why—they just want the how.
- The culture of organizations, which tends to reward individual initiative and causes employees to feel that seeking input from others is a sign of weakness.

“Mostly it's behavioral issues that get in the way of knowledge transfer. The soft stuff is the hard stuff.”

Kent Greenes

Leader of The Conference Board Research Working Group on KT and knowledge management expert

The way to combat these built-in barriers to knowledge transfer is with . . . more knowledge.

Form follows function. If you know what kinds of knowledge you're seeking to preserve, and what you're going to do with it, you'll have the tools you need for eliciting it. You don't bag a butterfly with a hunting rifle.

2. To Transfer Knowledge You Need Someone Willing to Impart It and Someone Willing to Accept It

It takes two to tango (and in the setting we're talking about, only one of them is likely to know what the tango is in the first place). Baby Boomer and Gen Y learning styles, like their formative experiences, are often as different as night and day—or a sock hop and a foam party.

Boomers, according to multigenerational workforce expert Diane Piktialis, a leader of The Conference Board Research Working Group are “digital immigrants.” They came late to computers. Gen Yers, says Piktialis, are “digital natives,” seemingly born knowing the techie details their older co-workers struggle with. In between is Gen X. Like Goldilocks' Three Bears, the three generations have specific preferences in the way they perceive the world—especially the world of work. Here is Piktialis' brief on the differences among them:

- Boomers like formal classroom instruction and reading material. “They have actually been known to read a company manual from beginning to end,” she says, “and not just once.” They prefer their learning to be formal and deductive, and they don't mind reading an instructional text or a technical manual.
- Generation Xers adapt easily to both formal and informal learning. Their highest priority is for **action learning** in the workplace. They need to find solutions to real problems. Incidental learning is also high on their list. They like to learn from experience, even when they make mistakes. “So don't make fear of mistakes part of your management style,” says Piktialis. “That talented up-and-comer might just leave for a more understanding workplace.

- Gen Yers turn Boomer learning style on its head. They learn best by inductive discovery. They want to do, not listen to somebody telling them what to do. “Jump right in” is their mantra. This is a trial-and-error crowd. Connectivity is a hallmark of Gen Y, the first generation to grow up with technology. They have a vocabulary of technologies: IMs, blogs, wikis, RSS feeds and podcasts—that may hold the future of knowledge transfer. But don't get the wrong idea. A Gen Y is likely to say that it's not about technology, but about the learning that technology enables.

Maybe, Piktialis says, it's time to enable these young learners on their own terms, by adapting proven knowledge transfer methods to the learning styles of younger generations.

That doesn't mean replacing every wise old Boomer with a laptop and an iPhone. These kids are about electronics, but not to the exclusion of human contact. They want direct interaction with experts. Just make it engaging, interactive, and short. They want “the beef” and only the beef. Hold the bun, fries and helpful condiments, er, comments.

3. How You Capture Knowledge Depends on the Kind of Knowledge You Want to Capture: Specific, Analytic, or Expertise.

There are more kinds of knowledge than there are species of butterfly. Well, three, anyway. And to capture them, you need a variety of nets and tools. Some are tried and true, others new and untested.

Specific knowledge has a short life span. “It rots,” says knowledge consultant Richard McDermott. It's factual, how-to stuff, most useful for novices. On the plus side, it's easy to capture. How? Here are a few of McDermott's suggestions:

- ask your experts to organize their files, and make them accessible.
- take novices on a busman's tour of the building, and explain things to them. And, by the way: **show, don't tell**. If you're talking about how a machine works, it helps to be standing in front of the machine.

Analytic knowledge is more complex. It's experts explaining their expertise. Think of Rostropovich talking about Beethoven's 9th. Think of your top geophysicist describing how he finds oil, or your best salesperson describing how she senses she can close a deal.

Harvesting analytical knowledge is—surprise—a job that requires analytical thought. How do you do it? A few ideas from McDermott:

- have your novices shadow your experts and write down what they do, as a set of thoughtful instructions.
- make a thinking framework for complex decisions, charging out points to consider, tools, resources, and guidelines based on your experts' sense of their own experiences.
- have mentors switch from periodic in-person and phone meetings to IM (instant messaging) for real-time insights.
- conduct interviews to elicit knowledge. These interviews are not idle chats, but carefully planned series of open-ended questions, some of which the interviewee has had time to think about beforehand. They can be conducted with a senior leader or expert, and, equally effectively, with the interviewee's peers and customers.

“The traditional methods are outdated, take too long and are not keyed into the incoming generation's ethos....”

Karl Kapp

Expert on the convergence of learning and technology, and author of *Gadgets, Games, and Gizmos for Learning*

Note from McDermott: It is hard to resist being “complete” in developing analytic knowledge. But completeness is not the point. The point is to be *helpful* to those using the knowledge.

Expertise is the highest level of knowledge. If specific knowledge is a tennis instructor showing you how to hold the racket, and analytic knowledge is your coach guiding you on strategy, then expertise is Justine Henin slamming a backhand past Venus Williams in the finals of the U.S. Open. It's a beautiful thing, encompassing flow and Zen and the mastery of the unconscious mind, not to mention years and years of practice.

“Experts are not looking at what they know; they're looking through what they know.”

Richard McDermott

How to extract unconscious knowledge

- Develop cases that pose thinking problems that learning practitioners can think through. Then have follow-up cases in which experts describe what they did and why.
- Sponsor a master class, where the teacher doesn't lecture, but shares her expertise through example.
- Recreate the expert's experience through virtual environments - simulations and serious games - to allow application of knowledge in a real-world context.

Practice makes perfect

The old medical-school adage about teaching surgery used to be “see one, do one, teach one.” Thanks to simulations and virtual operating rooms, it’s now “see one, do many, teach one.” That’s a lot more healthy patients.

Practice, but practice right. A good practice session:

- focuses on gaps in expertise
- repeats, repeats, and repeats
- is coached by an expert
- builds on conscious reflection so you can make sense of what you learned

Granted, there are few corporate jobs in which expertise looks as straightforward and obvious as a great backhand—not at first glance, anyway. But deliberate practice begins with the process of breaking down a job into specific skill sets and identifying performance gaps. Many skills, from making a sales pitch to analyzing a portfolio, can be practiced with the help of new technology, through computer simulation programs and “serious games.”

Remind your novices that if this weren’t hard, it wouldn’t be called expertise. Explain to your novices and journeymen that they will become experts only through practice, which will embed their conscious lessons into their muscle memory and free their unconscious minds to perform the inspired improvisation—within rules—that is expertise.

“The world is full of videotapes nobody listens to.”

Kent Greenes

4. Knowledge Transfer Is Not the Same as Knowledge Capture

Think of useful business knowledge as a fragile, endangered species of butterfly. Sure, you can capture a few butterflies and stick them in a cage for safekeeping. But they will be too unhappy to flutter around and amuse you, and too depressed to reproduce. If all you do is catch some facts—in a report, on a videotape—you’re just collecting. And you know what happens to collections: they gather dust. Knowledge isn’t valuable until somebody uses it.

So your goal is not merely to drag knowledge out of people; it’s to ensure that this knowledge will be used for something other than justifying the salary of the company archivist.

To do that, you must **distill** what you capture into useful pieces, **translate** it into a relevant and compelling story, anecdote, tool, or process map, **store, manage** and make it accessible, and **initiate a feedback and ownership process** to measure how much people are using it, or why they are not.

Distilling your knowledge means turning it into what Greenes calls a “nugget.” A nugget makes you think of gold—it’s valuable—and a nugget is a discrete, identifiable entity, like a fact. In this it differs from the amorphous, formless knowledge that it used to be, before it was captured, isolated, and identified.

Once this nugget is transferred to the knowledge recipient, it will become embedded in that person’s consciousness through repetition and attachment to other facts and ideas. Gaining context, it will become a part of the recipient’s brain, and in so doing it will look different than the same piece of knowledge when it was in the knowledge-transferer’s brain.

“What I learn from the person before me changes the minute it enters my brain,” says Greenes.

Successful knowledge transfer should, in effect, rewire the corporate brain so that it can absorb those nuggets of knowledge with the same organic ease that the individual brain does.

How to do this:

- **Show how and where the knowledge will be used.** Build a process map or workflow of the knowledge, linking specific nuggets with relevant sub-processes and activities.
- **Show by whom the knowledge will be used.** Link the knowledge to people. Include hyperlinks and e-mail addresses in the text of your process map. And make a list of all the people with any relationship to the knowledge.

Now that you've distilled your knowledge into a manageable nugget with a context of its own and a process map that mimics the processes in your own brain, it's time to **translate** that knowledge. If distilling means making something digestible, then translating it means making it tasty – making it appeal to other people's tastes.

To understand this, we go back to our previous lesson on intergenerational learning styles. What's tasty to a boomer will likely be ashes in the mouth of a GenYer, and vice versa. Furthermore, even within generations, people learn differently: some have visual memories and bad ears, some are aural learners who barely take notes. The best way to translate knowledge is to add richness by adding media, making the medium of transfer different for different people.

Packaging knowledge to appeal to all generations

Your knowledge transfer vehicle shouldn't, then, simply be a text. It can be a text, a CD, and an audiotope. It can be a video, a text box, and a website. Heck, it can be a papyrus scroll and a vinyl record, if that's what you think will make it tasty to the people who need to learn it. But

however you choose to package and publish this knowledge, know that the knowledge transfer process will not be over until your product has been absorbed into and adapted by the individual brains in your organization, enabling them to work together collectively as a smooth-running and extremely intelligent machine.

Use your captured knowledge, or lose it. Stick your butterflies in a cage and ignore them, and they'll turn back into caterpillars. Make a plan for your butterflies, and they will enrich your life, and your company, for years.

About this report

Capturing Butterflies and Making Them Talk has been developed as part of The Conference Board's Mature Workforce Initiative. This Initiative is committed to helping employers engage and develop mature employees within the rapidly changing multigenerational workplace. Our evolving work is validated by frequent interaction with our 2,000 member companies as we respond to their emerging business issues.

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About the author

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