

Bridging the Gaps: Generational Knowledge Transfer



Alberta Leading In Learning Series

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Agenda

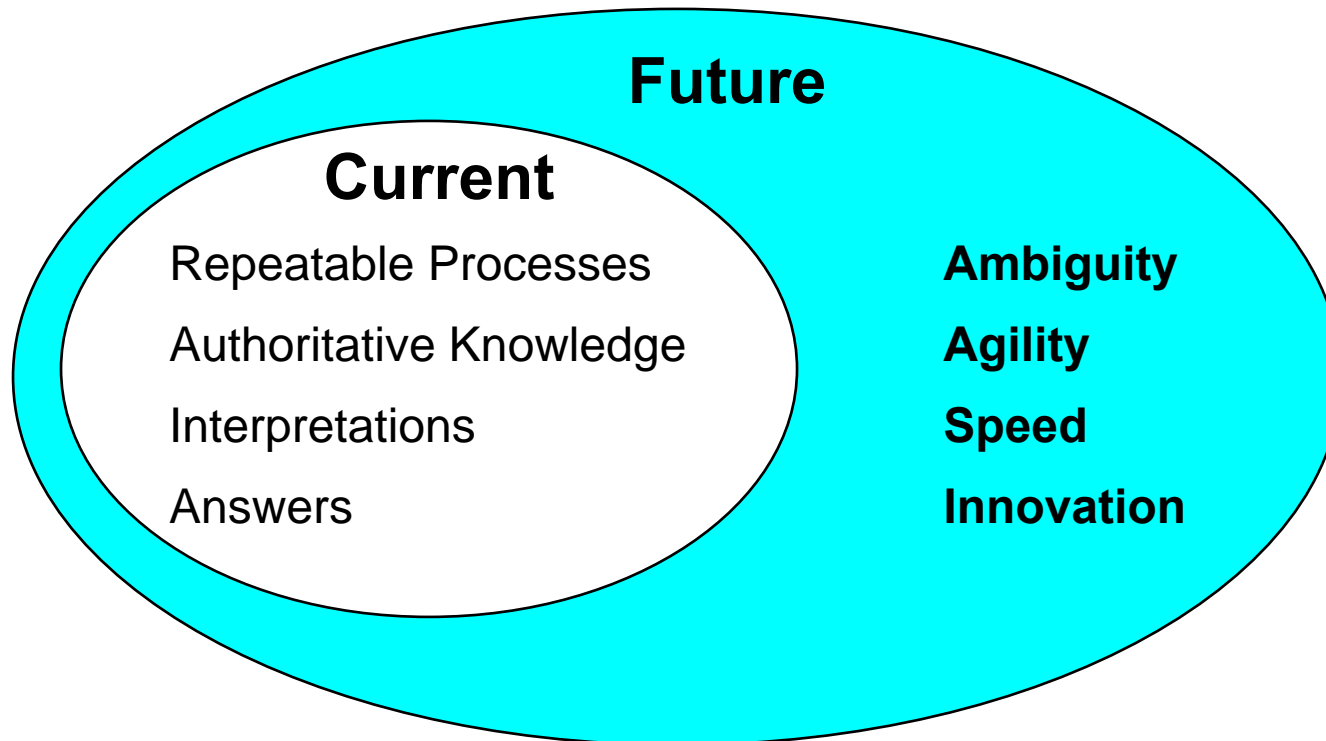
- Some Context & Insights
- The Business Case
- Knowledge Transfer Fundamentals
- Generational Learning Preferences
- Social Media meets KT
- Generational Adaptations
- Emerging Challenges

Context

- Increasingly complex business, markets & missions
....it's a VUCA* world!
- New digital workplace is enabled by an increasing mix of new and old technologies
.....resourced by multiple generations of workers
- More & more organizations are factoring cross-generational challenges and collaboration into their strategies and operational missions.

Hope is not a method!

Business Drivers for Generational Knowledge Transfer



Drivers for Change:

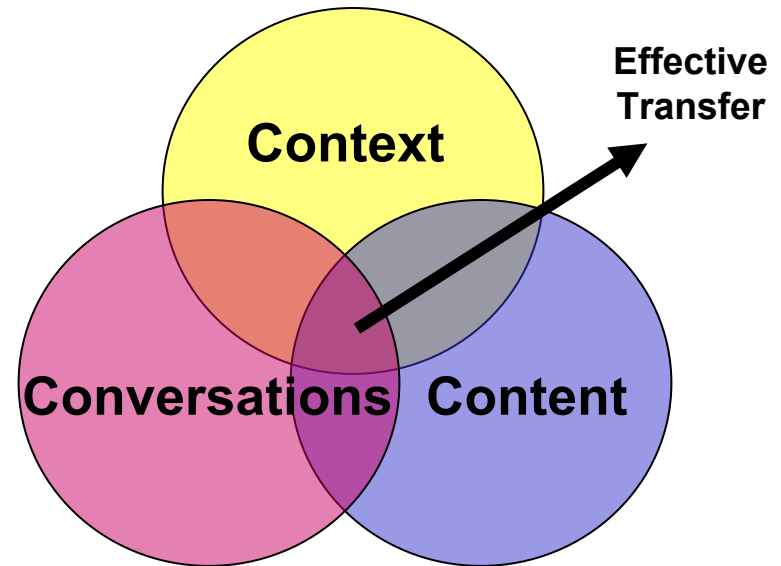
- Cost of Operations
- Regulatory Changes
- Evolving Technologies
- Competition
- Client Demand
- Increased Tempo of Operations
- Shift in Workforce Demographics

***When it comes to KT,
how are you dealing with these changes?***

Some Insights

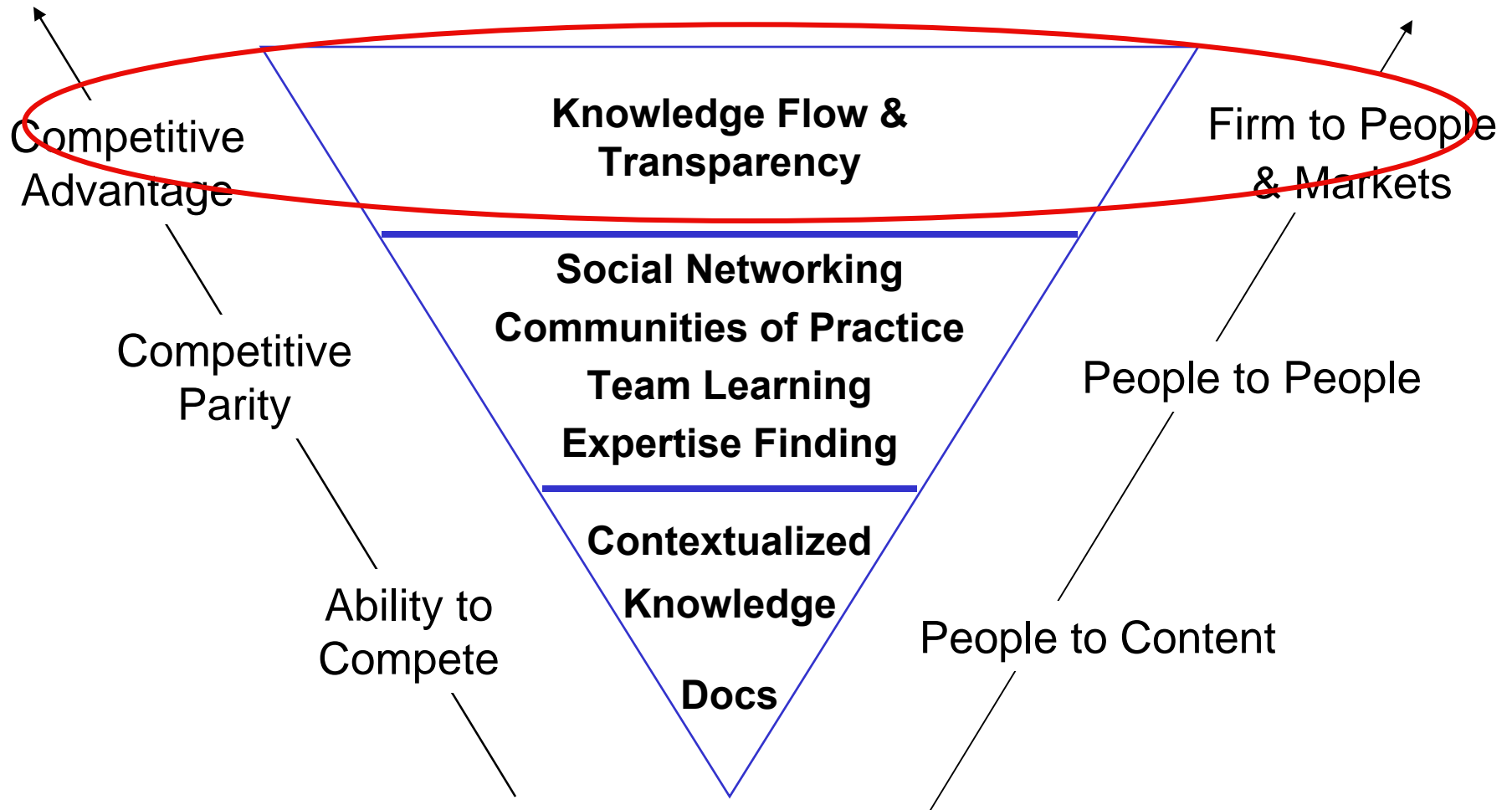
(60 organizations over 16 years)

- KT is everyone's job
- Knowledge doesn't move by itself
- Good ideas & knowledge can come from everywhere
- 'Nice to have' isn't good enough
- Don't underestimate the effort required by the source and receivers of knowledge
- Timing is everything
- Age & technology matter!



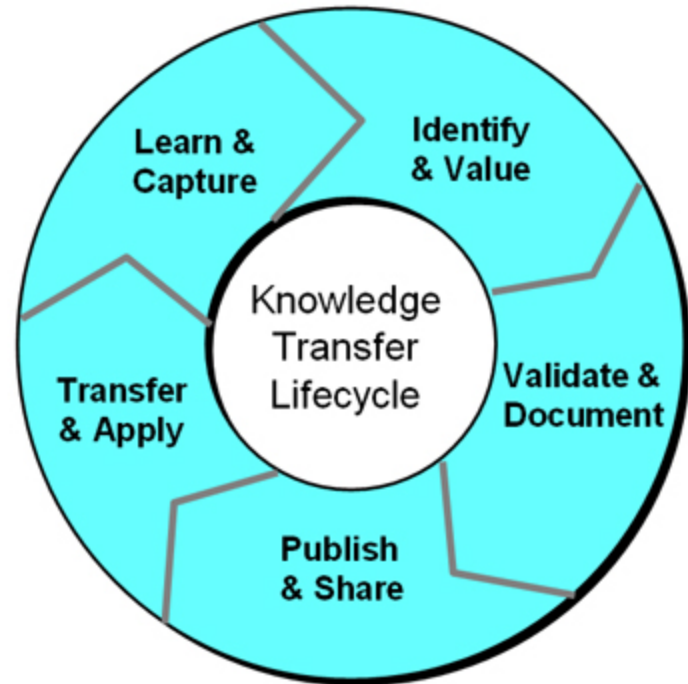
***It's more about the flow
than the stock!***

Hierarchy of KT Needs



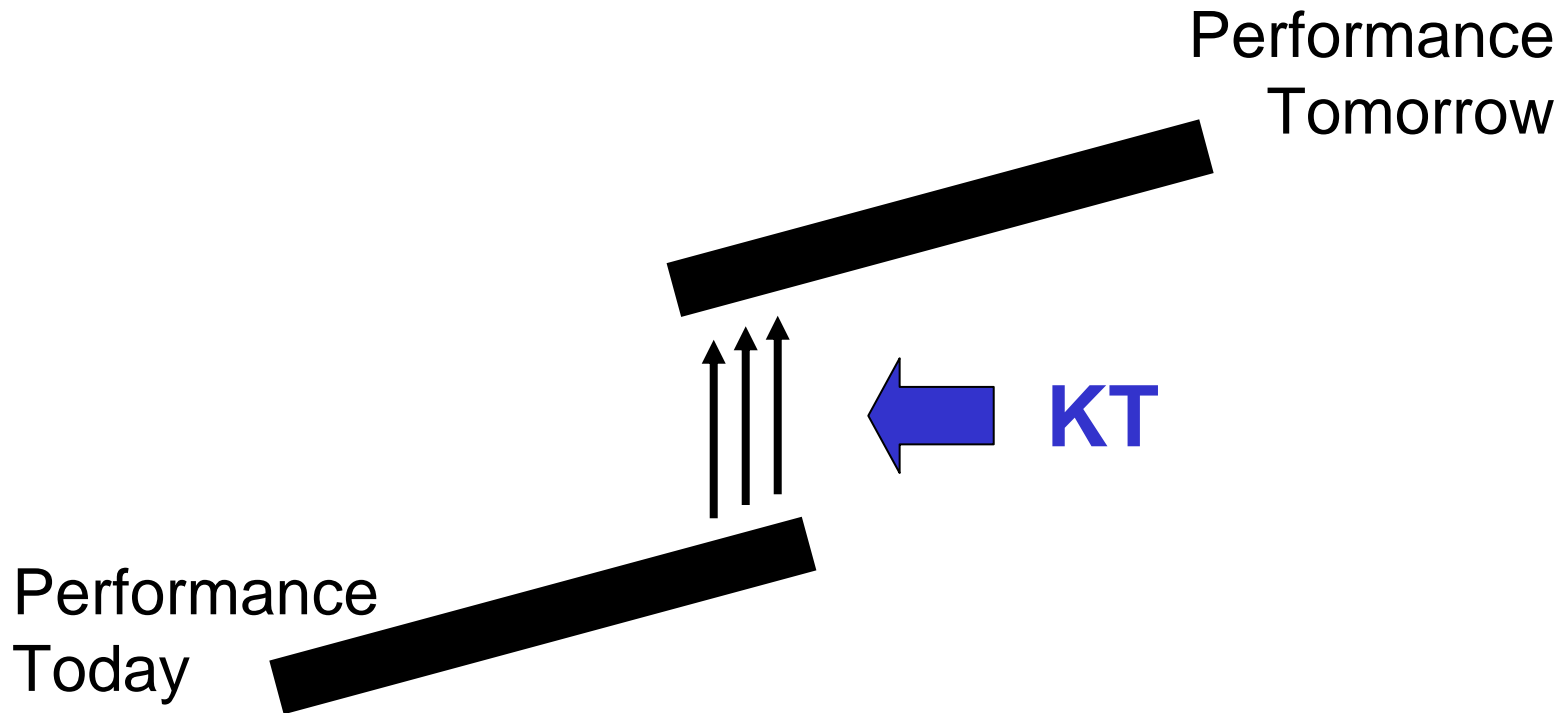
What It Takes to Transfer Knowledge

- A need for the knowledge
- Knowledge source(s)
- Knowledge receiver(s)
[customer(s) for the knowledge]
- Relationship & trust
- Application
 - Context
 - Type of knowledge
 - Usage



And, it has to be fast or people will just go with what they already know!

So, Why Generational KT?



*In service of **extraordinary** performance
... KT 'costs' too much to be just about incremental
improvement!*

Why: Some Critical Knowledge Losses...

- NASA officials warn that “all of the knowledge about how to get to the moon has disappeared from the organization.”
- A senior corrosion engineer in a major oil company retires and takes with him critical knowledge about corrosion prevention. Two years later, “extensive corrosion” causes a massive oil-pipeline spill forcing the shutdown of 8% of U.S. oil production.
- The elimination of apprenticeship programs in the U.S. nuclear power industry has significantly impacted their ability to design and build new plants. They are unprepared to meet the renewed demand and investment and are unable to deliver in a timely manner.

Why: Some New Factors...

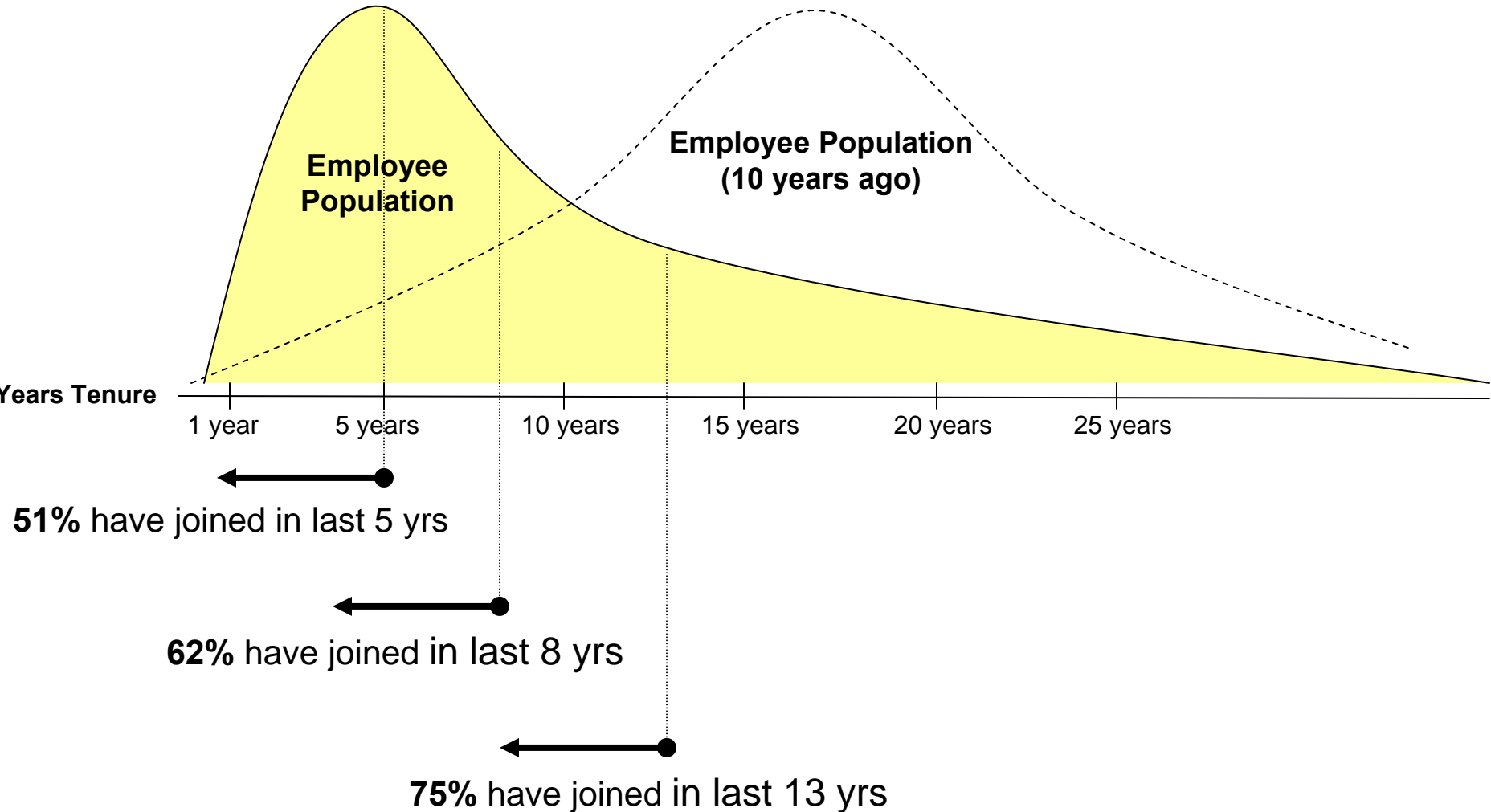
- **There's been a pause in the 'brain drain', but it's only temporary...**

...the combined forces of an aging workforce plus the increasing complexity of business knowledge have converged to create a profound gap in our ability to grow and add new value.

- **Young people are bringing new experience and skills to the workforce...**

...this knowledge is needed by boomers for everything from communicating to marketing to operating the latest computer systems.

Inflow / outflow of knowledge & experience: Demographics of a global consumer products company

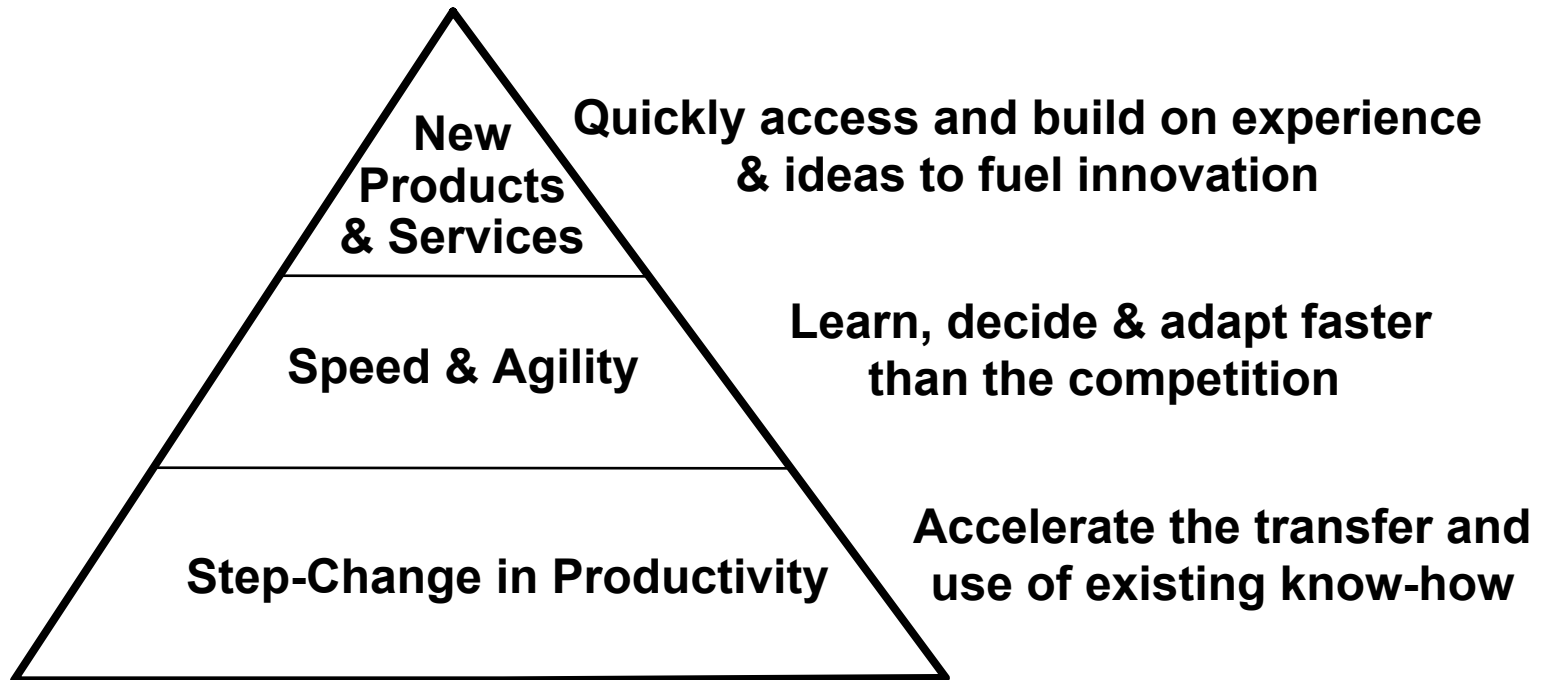


**Who's putting effort into bridging
the gap between generations in
their workforce?**

**...where does this sit on your list
of business priorities?**

The Business Case for Generational Knowledge Transfer

A significant number of Millennials are needed to do the work required for growth!



The Gist of Generations

- Members of a generation **share a common time in history**
- This commonality creates generation-specific **attitudes, values, preferences, and behaviors**
- Differences between generations can affect:
 - talent management
 - **interpersonal and team dynamics**
 - **communication**
 - **knowledge transfer**

Some Caveats

- Generalizations about generations **highlight trends**
- There are many **differences within a generation** and many similarities between generations
- Generational definitions **largely US centric**, though have relevance to Europe, Canada, Australia

The Four Generations at Work

| <u>Generation</u> | <u>Years Born</u> | <u>Ages Today</u> |
|-----------------------------------|--------------------|--------------------------|
| Veteran or Traditionalists | 1925 - 1945 | 64 - 82 years old |
| Baby Boomers | 1946 - 1964 | 45 - 63 years old |
| Generation X | 1965 - 1981 | 29 - 44 years old |
| Millennial | 1981 - 2000 | 9 - 28 years old |

Which generations are represented here?

Generations: Who's Who*

- **Matures or Veterans (born 1925-1945)**

Veterans are loyal and have respect for authority. Prefer “command and control” leadership and will make sacrifices for getting the job done. If you look at the organizations controlled by people in this age range, you will see how powerful the members of this generation are. Also called **Silents**.

Generations: Who's Who*

- **Baby Boomers** (born 1946-1964).

These were the children born following World War II. There was a massive increase in the birth rate, known as the Baby Boom, which began shortly after the end of the war. They are very competitive and have faith in their ability to change things for the better. They are optimistic and idealistic but realize that loyalty is “dead.” They have much understanding of the history of the organization, enjoy leadership roles, are good team players and like to be recognized for their wisdom. Social scientists are beginning to study the second half of the Baby Boom (born 1955-1964) to identify differences from the early Boomers.

Generations: Who's Who*

- **Gen Xers** (born 1964-1981)

The group identified as Gen X began when the birth rate decreased after the end of the Baby Boom. The term Generation X became widespread after the publication in 1991 of Douglas Coupland's book of the same name. Gen Xers have seen much failure in public and personal institutions and trust themselves rather than institutions. They tend to be skeptical and independent and want work life balance. They dislike rules, red tape, corporate politics and prefer “business casual.

Sources: Center for Creative Leadership "Emerging Leaders" Research Study; *Generations at Work*, Zemke Raines and Philipczak (2000); *When Generations Collide*, Lancaster and Stillman (2002)

Generations: Who's Who*

- **Millennials** (born 1981 – 2000)

Very techno-savvy, value diversity and have a global perspective. Want lots of feedback and ongoing communication very entrepreneurial and expect managers to help their professional development. Don't expect to stay in one job or career for too long.

What stands out from latest research:*

- **Work & jobs 'with meaning' trump desire for wealth**
- **Don't handle feedback effectively**

Sources: Center for Creative Leadership "Emerging Leaders" Research Study; *Generations at Work*, Zemke Raines and Philipczak (2000); *When Generations Collide*, **Lancaster and Stillman 2010*** [global research](#)

Some Generational Differences at Work

- Attitudes and expectations toward work
- Work styles
- Job satisfaction criteria
- Rewards & benefits
- **Learning styles/preferences**
- **Communications (technology)**

Generations and Knowledge Transfer

In knowledge transfer age matters.

- Pay attention to the receiver, not just the source
- Generational learning styles and motivations matter
- Not all generations are equally different
- The digital divide is extremely important

Source: The Conference Board, research report of the Multigenerational Knowledge Transfer Research Working Group to be released June, 2008

Generational Clash Point

“chain of command”

Traditionalists

“change of command”

Boomers

“self-command”

Xer’s

“don’t command – collaborate!”

Millennials

Do we need to be concerned?

Boomers and Matures

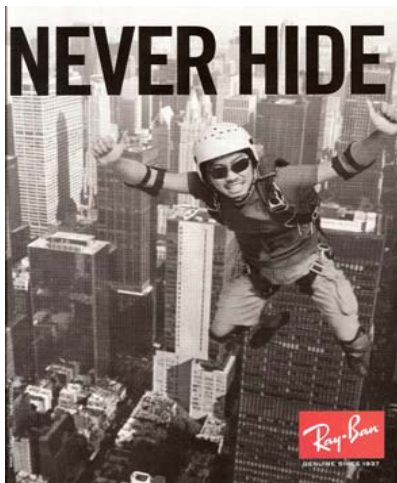
Formal learners

- Based on how they learned to learn
- One way communication
- **Reading, text driven**
- Linear
- Deductive and abstract
- Traditional lecture format



Gen Xers

- Visual stimulation
- Few words
- FUN



***Combination of
informal and formal
learners***

Millennials

- Visual/spatial skills highly developed

- Attentional deployment



- Expect speed and fast response time

- Inductive discovery
 - Visual images

Material must be:

- Immediate
- Interactive
- Engaging

◆ **Social Connectivity**

* **Informal learners**

The Generational Digital Divide

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"Sorry to get you out of school this early, son, but I need your help with this computer."

Digital
Natives
Gen Y

Digital
Immigrants
Matures
Boomers
Gen Xers



"THE TEACHER GAVE US THESE BOOKS BUT I CAN'T FIGURE OUT HOW TO TURN THEM ON."

The Social Dimension of Learning – Connectivity

- The “**social**” dimension of learning takes new form for Millennials
- They **openly seek input** from many people and online
- Preference for **working in teams or interacting peer to peer** (face-to-face or virtually)
- **Still want direct interaction with experts**

Generational Learning Styles & Preferences

Comparison of Previous vs. Current Learning Styles

| Characteristics, Dominant Learning Style of Previous Generations | Characteristics, Dominant Learning Style of Virtual Generations |
|--|---|
| Linear Acquisition of Information | Nonlinear (hyperlinked) logic of learning |
| Focused mainly on facts and knowledge acquisition | Focused more on deutero-learning (learning how to learn) |
| Guided Learning | Autonomous learning |
| Learning in specified time periods | Learning 24/7 |
| Face to face learning | Interactive virtual learning |
| Learning as Individualistic | Learning as Social |
| Rote learning | Analogical learning |

Learning & KT 1.0 → Learning & KT 2.0

Millennial Preferences That Demand KT Attention

- Communicate, engage and 'learn' online
- Adept at gathering information and sharing with peers
- Spirit of openness
- 'Multi-tasking' as a way of life (and work)
- Geared for teamwork
- Natural networkers
- Empowered

Isn't this the workforce we've been trying to create ... Generation Virtual?!

In Their Own Words...

“ Millennials communicate differently. One PR woman I spoke with told me her daughter tried to quit her job via email.”

“My boss just sent me an email to let me know my services were no longer required.”



"I'll have someone from my generation get in touch with someone from your generation."

Relevance to Knowledge Transfer Practices

“The traditional methods are outdated, take too long and are not keyed into the incoming generation’s ethos...” -- Karl Kapp*

**Author, Tools and Techniques for Transferring Know-how from Boomers to Gamers*

Leveraging New Social Media

- The latest tools for communication and collaboration align with the learning preferences of Millennials
 - Digital & online
 - Just-in-time
 - Brief
 - Informal
 - Rich media



Proven Knowledge Transfer Methods

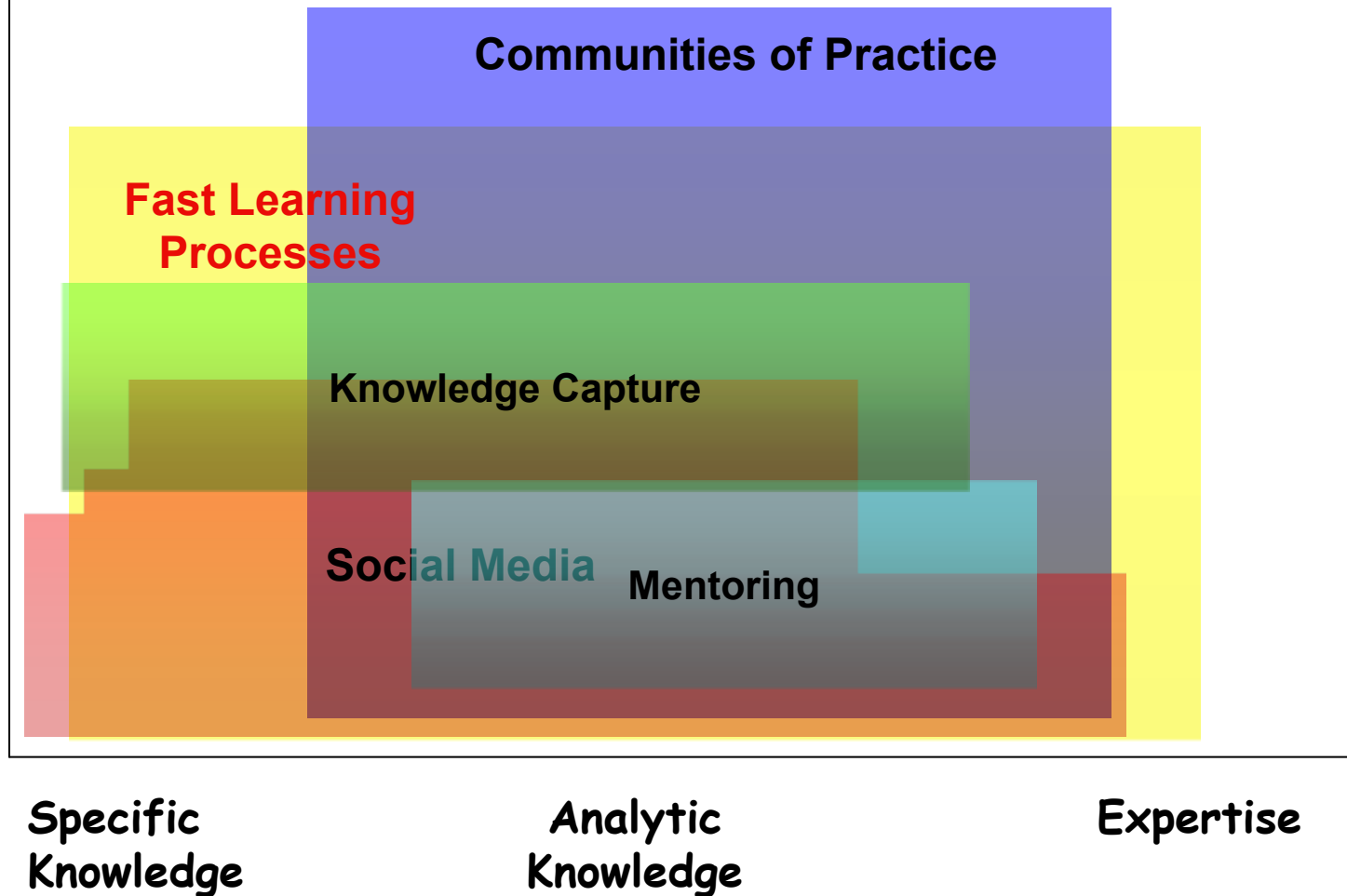
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|-------------------|--|--|-----------|
| Different Context | <p>Formal Education</p> <p>Training</p> <p>Podcasts</p> <p>Communities of Practice</p> | <p>Case Histories</p> <p>Master Classes</p> <p>‘Serious’ Games</p> | |
| | <p>Digital Knowledge Capture</p> <p>Action Reviews Retrospects</p> <p>Wikis</p> <p>Interviews</p> <p>IM Twitter</p> <p>Blogs</p> | <p>Mentoring</p> <p>Peer Assists</p> <p>Apprenticeship</p> <p>Simulation</p> | |
| Same Context | Specific Knowledge | Analytic Knowledge | Expertise |

What are some ways you are transferring knowledge across your multi-generational workforce?

“Biggest Bang for Buck”

Different
Context

Same
Context



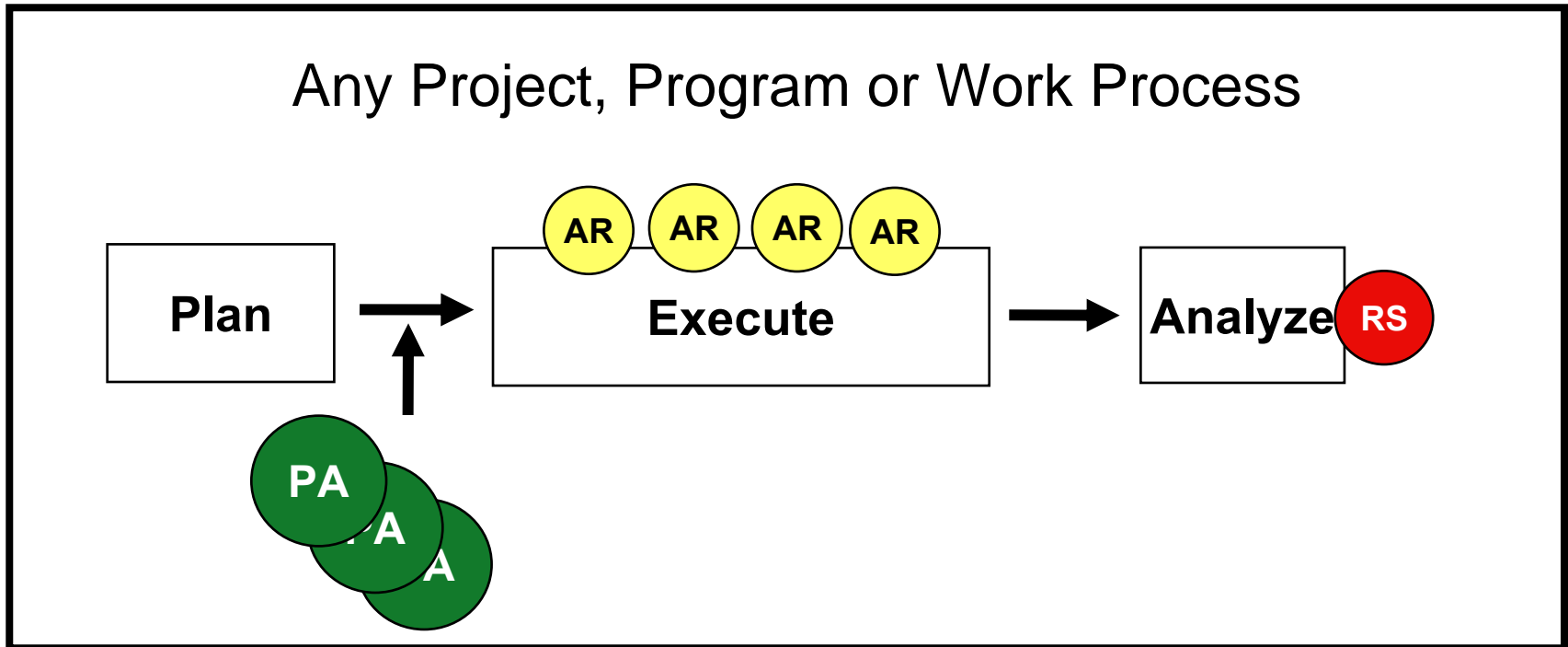
Generational Adaptations: Mentoring

- Virtual environments to connect mentees and mentors
- Use Texting and Twitter ‘in the moment’ to support mentorships when the need is most relevant
- Group mentoring via Discussion Forums or Wikis for different time, different place interactions
- Reverse mentoring to help boomers with new social media, and to engage Millennials



“I suppose I could use Instant Messaging to communicate in real time with those I mentor ..not just scheduled meetings”
- Boomer in global chemical company

Fast Learning Processes



Learn Before Doing:
Peer Assist
(2 hrs to 2 days)



Learn While Doing:
Action Review
(15 min)



Learn After Doing:
Retrospect
(2 to 4 hrs)

*Highly relevant,
timely knowledge transfer*

*Immediate
improvement*

*Creating &
capturing knowledge*

The Peer Assist: *Learning before doing*

- Targets a specific business challenge
- Seeks insight from peers outside the team
- Identifies new possibilities, options & questions
- Improves plans before they are implemented
- Providers of knowledge often learn something new to take away
- Initiates or renews
Networks/Communities of Practice

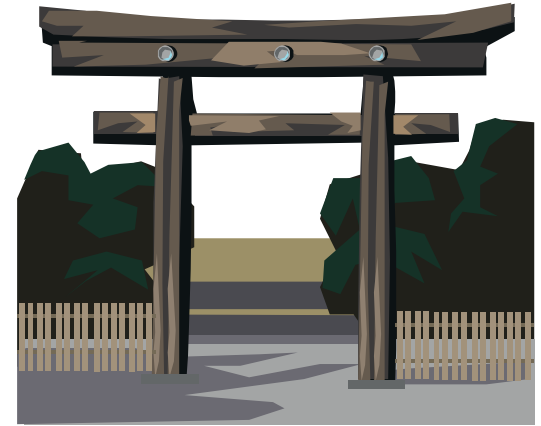


**Facilitated
work-session before the
work is started, lasting
anywhere from 2 hours
to 2 days in duration**

Peer Assist Example

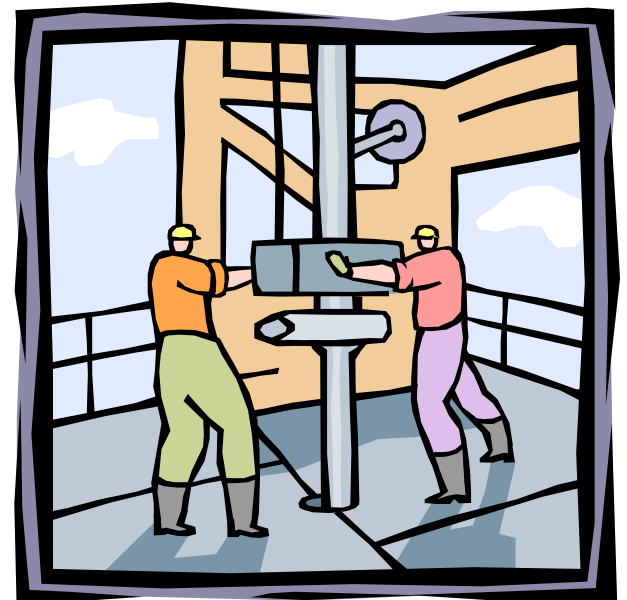
Accelerating Retail Market Entry, or *Getting Naked in Japan!*

- The challenge: BP's first attempt at entering the retail market in Japan, and opening up their first gas station on a highly competitive street corner in Tokyo
- The participants: Highly diverse local team & visiting peers from US, Scotland, England, Japan, Moscow, Venezuela and China & building contractors from the US & UK
- The issue: Participants not speaking up about 'the elephant in the room', which minimized sharing or their good practices
- Message: Sharing social experience builds the relationships and trust needed for open conversation & knowledge sharing



Virtual Peer Assist: *Cement Casing Example*

- Norway drilling team is two months away from setting casing in a deep water, high pressure well off the coast of Norway
- The Business Unit hasn't drilled or cased a well in this environment in 30 years
- Sought drilling engineers (visiting) peers from around the globe that have set casing (cement) in high pressure wells before – found 8 that could participate in a virtual PA
- Didn't know each other, 50% Millennials
- In 2 hours, visiting peers shared enough cementing knowledge to change the Norway plan
- Reduced their cementing costs by \$2 Million



The Action Review

Learning while doing

4 Simple Questions:

- What was supposed to happen?
- What actually happened?
- Why is there a difference?
- What can we learn from this and do right now?



After any event, sub-task or milestone - just 15 minutes to improve work for tomorrow, while building team relationships, trust and learnings

The Retrospect:

Learning after doing

- What was the objective of the project?
- What did we achieve?
- What were the successes? Why?
How can we repeat the success?
- What were the disappointments?
Why? How can we avoid them in
future?
- 'Marks out of 10'



Facilitated, forward looking team meeting (half-day), soon after the project has ended

Generational Adaptations: Fast Learning Processes

- Younger generations are more inclined to seek input from multiple sources...but need prompting to speak up and share their experiences
- Gen Xers and Millennials may be more inclined to participate if the session is held virtually
- Consider using a Wiki to provide a collaborative space for all participants to document the proceedings
- Use ARs with Millennials to keep them from 'failing too far'
- Boomers prefer stories of experience more than Millennials ... but it's really how you tell the story!

“Be quick concise and to the point.”

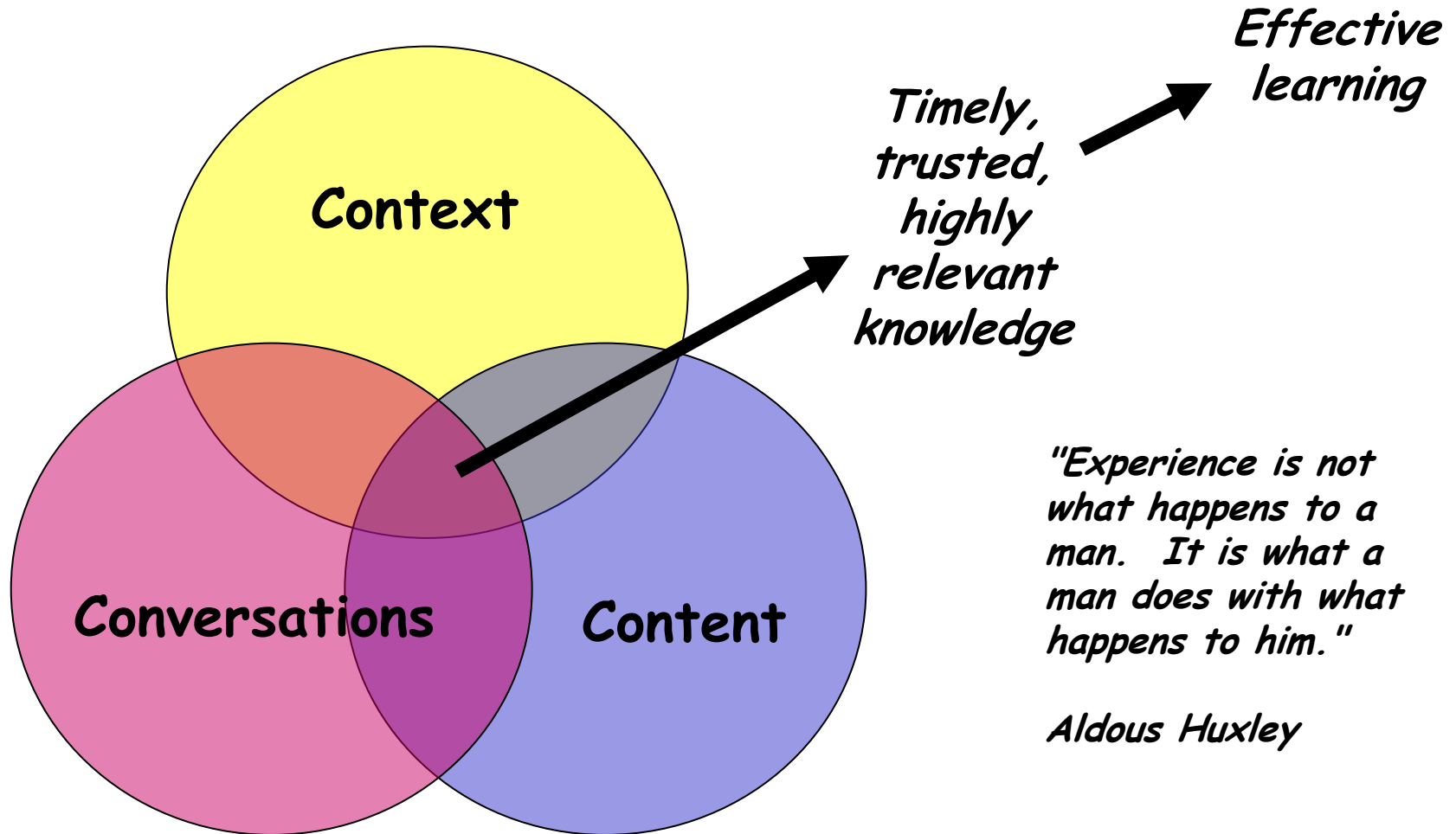
-- Millennial employee in global pharma company

Communities of Practice

- Intentional groups dedicated to sharing knowledge among practitioners
- Common and specific sense of purpose
 - Not boilerplate
 - Stewardship
- Relevancy to today's and/or tomorrows business or mission
- Operate though trust, reciprocity & recognition
- Respected, passionate & trained leaders
 - Know how to engage and influence
 - Often a shared responsibility
- Easy to use, virtual (IT) connection place
 - Discussion forum
 - Place to store collective know-how
- Meet face-to-face once in a while

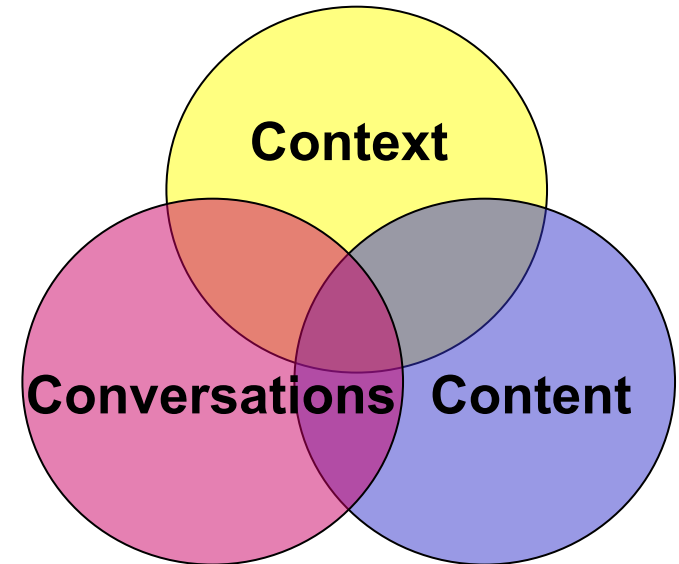


Why Communities Work: *Effective Knowledge Transfer*



Generational Adaptations: Communities of Practice

- Open up your community to practitioners *past, present and future*
- Offer a choice of social media tools with guidance in their application to support interactions and knowledge exchange preferences of multiple generations
- Support sub-setting of CoPs to facilitate conversation among generational peers, but ensure relevant 'nuggets' and issues are passed to the broader CoP membership
- Provide an experienced CoP facilitator to observe, coach & promote cross-generational interactions



Digital Knowledge Capture: Making Knowledge Explicit



- Laborious
- Time consuming

- Creative
- Value-adding
- Essential

Common themes and learning,
nuggets of insight, consistent
advice, quotes, sound bites, and
key documents

Generational Adaptations: Digital Knowledge Capture

- Use social media to make content more 'rich' & contextual – voice, video & graphics
- Small chunks of knowledge content via Podcasts and Videoclips (UTube)
- Wikis for collaborative, open & dynamic authoring & editing
- Ask novices what they would like to know
- Make the highly visible & easily accessible



“I just want to Google it”
- Millennials in Insurance Company

Surprise Example: A-Space

- Making use of the cognitive diversity that exists across sixteen US Intelligence Agencies to address adaptive challenges
- A Facebook-like environment in which analysts collaboratively create new meaning out of diverse ideas to break through long held assumptions
- Provides a conversational format to engage in joint sense-making
- Builds networked relationships without the costly time investment required to maintain “strong ties”
- Reinforces the value of asking questions of colleagues
- Non-hierarchical nature results in younger analysts feeling that it is okay to offer their thinking even if it is not completely formed

Provides a venue for seamlessly incorporating cognitive diversity to address complex issues.

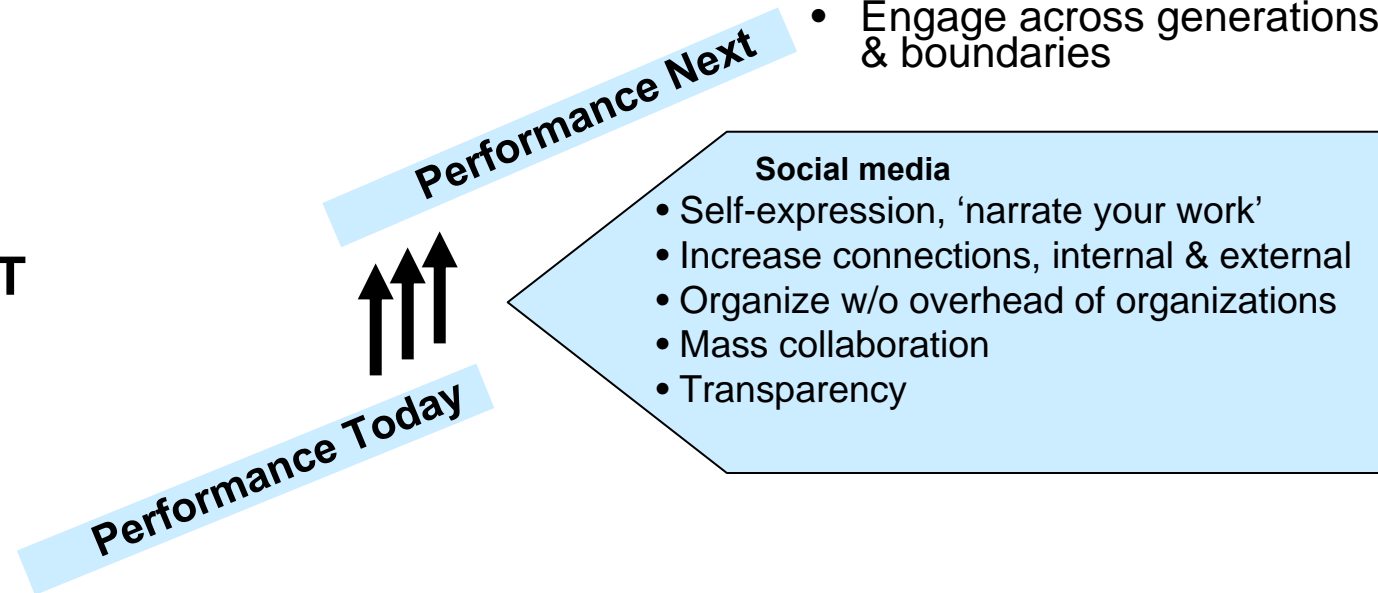
Social Media...A Force Multiplier for KT!

Step-Change in KT

- Leverage collective experience, from everywhere
- Frictionless flow of knowledge across the value chain – from ideas to implementation
- Learn & adapt faster than the speed of change
- Accelerate growth and retention of people & K
- Engage across generations & boundaries

The 'Promise' of KT

- Leveraging explicit know-how
- Enhance efficiency of repeatable processes
- Learn faster than the competition
- Retain the knowledge of our aging workforce



Knowledge Transfer Across Boundaries: *Emerging Challenges*

- Open collaboration
- Connection across the entire value chain
- Experimentation
- 'Learning in Public'
- Convening conversations without controlling them



*The next successful people will be those that facilitate the flow & transfer of knowledge across generational, geographical & functional boundaries...**in what ways are you enabling this?***