Wisdom is experience

Capturing the Knowledge of Older Workers

How many of us have experienced a 'go to' person within an organisation, you know, that individual who seems to know how every system works, the location of every file, who to call on a specific issue?

I have come across this in almost every place I have worked. It is usually someone who has been in the business for a relatively long period of time, 10 years plus. They know the 'history' of the organisation, were involved in the evolution of the systems and processes, understand the decision making rationale and key relationships, and invariably have a fair degree of knowledge around most of the job roles.

With an aging workforce, today, more than ever we need to take stock of the knowledge held by our older employees and convert their individual knowledge into institutional memory.

The process of capturing this information often highlights hidden elements performed by people in these roles and creates opportunities for discussion around succession planning and mentoring of existing employees. Some organisations record their history in terms of dates and key milestones, for example, when the company was formed, by whom, mergers, change of location and so on, but this does not reflect the wealth of knowledge held by long term employees.

A simple way to capture this information is through a single or series of 'knowledge transfer' interviews.

What information is valuable for the business?

Employee's history	Employees who have been with the company for a number of years have a wealth of information about the company in general as it has grown over the years.
Employee's personal role	It's important for persons who follow in the footsteps of these employees to understand how they've developed in the organisation and how this made them successful in their position. This information can assist in their success or understanding of growth opportunities, relationships, functions and skills requirements.
Employee's working relationships	Focuses on the working relationships that the employee's position involves. Regardless of what position they've performed within the organisation, there are a multitude of relationships that exist. Some of these relationships may serve as critical to the position.
Employee's decision making process	Capture the employee's decision-making processes and delegations. Any decision that they're responsible for making should be documented. List the decisions they are typically making on a daily, weekly and monthly basis. Also ask employees to list the people who have been instrumental in guiding their decisions.
Employee's attendance at meetings	It is important to analyse the meetings the employee is obligated to attend on a regular basis. Looks at the meetings the employee attends, their purpose and perceived value.
Document operational processes	List the top five processes they must complete (daily, weekly and monthly) in order to accomplish the necessary tasks of their position, as well as the technology tools the employee utilises on a regular basis, including general software programs and programs that are specific to the employee's position.

Employee Questionnaire

Section 1: Your History

What year were you hired? _____

How many employees did the company have when you were hired? _____

Do you know what the annual turnover was at the time you were hired? _____

How would you describe the organisational culture at the time you were hired? _____

_____

_____

Section 2: Your Personal Role

Describe the position you were hired for and state the position title you were given. _____

_____

_____

List the positions you have held in this organisation and how long you remained in each. _____

_____

_____

_____

List the education requirements you were required to have when you were hired for this positon. _____

_____

_____

Are those education requirements still the same today, if not why not? _____

_____

_____

List the essential duties that have been added to your original position over time and why this happened. _____

_____

_____

_____

Describe the language skills necessary to perform this position such as: ability to interpret rules or policies, written and verbal communication skills, ability to complete or write reports, etc. _____

_____

_____

Given your knowledge of the position, what qualifications would have assisted you in the early days, to perform your role?

_____

_____

Describe the initial training you received to learn your current role and who trained you? _____

_____

_____

_____

Section 3: Working Relationships

Who is your immediate supervisor and how long has this person been your supervisor using years or dates.

_____

_____

Describe the interaction that takes place between you and your supervisor when you are assigned a new task/project.

_____

_____

How do you communicate, by phone, email, in-person, and how long on average do you spend with your supervisor discussing new tasks/procedures._____

_____

_____

Describe the situations in which you choose to include your supervisor even though it is not a requirement of the role. Be sure to explain the reasons for your decision to include your supervisor. _____

_____

_____

_____

Describe who you are required to interact with daily/weekly to achieve success in your role, name the people and their roles _____

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_____

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_____

Section 4: Employee's Decision-Making Process

List the daily decisions you are responsible for making in your current position. Include details for the purpose of each decision you list and how if helps the rest of the organisation _____

_____

_____

_____

List the weekly decisions you are personally responsible for making in your current position and the relevance/impact it has for the rest of the organisation. _____

_____

_____

List the monthly decisions you are personally responsible for making in your current position and the relevance/impact it has for the rest of the organisation _____

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_____

List the people who have been most instrumental in guiding your decisions making _____

_____

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_____

Section 5: Meetings

List the regular meetings you attend and the purpose for each meeting. Describe the people and their roles that typically attend. In addition, state whether the meeting is in-person or a telephone conference, link, skype.

Meeting	Type	Purpose	Participants	Frequency

List the meetings that have been most effective in helping you in your position. _____

_____

_____

List the meetings that have been least effective in helping you in your position. _____

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Section 6: Processes

List the top five processes/tasks that you must complete to be successful in your position. Think in terms of those that are completed daily, weekly and monthly. Document details of why each process is important.

Process	Value of process

List various technology tools within the organisation that you use on a daily basis. Include any software programs for general purposes and those that are specific to your particular position.

Process	Purpose of process