

INASPO 2008 ANNUAL CONFERENCE
September 8-11, 2008 • St. Louis, Missouri

Managing the Risk of Knowledge Loss Due to Workforce Attrition

Retaining and Leveraging the Critical and Relevant Knowledge of
the Procurement Workforce

Professional Development Session
National Association of State Procurement Officials
8 September 2008

Bill Kaplan
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What if risk of knowledge loss could be managed like this?

Wouldn't it be great if this could be a leading practice?




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Why Is Knowledge Loss A Key Workforce Challenge We Are Facing?

- Loss of knowledge -- and people with the knowledge -- between agencies and those leaving government is increasing
- No integrated process or framework to capture and reuse the workforce's relevant information, experience, and insight on a consistent and disciplined basis
- Complicating factors:
 - (1) increasing size and complexity of procurement workload
 - (2) decline in number of professionals in procurement workforce
- It exists at the leadership level and at the workforce level -- it's multi-generational and still not priority for most organizations



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Definitions

- **Attrition:** Change in the numbers, skills, and competencies in the workforce due to retirement, promotion, transfer, career change of leadership and workforce
- **Critical Knowledge:** Knowledge that is fundamental to the business or operational processes of the organization that supports mission delivery and mission success

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Quick Survey




On a scale of 1 to 5, how would you rate your organization's challenge in addressing the risk of critical knowledge loss due to workforce attrition?
(1=low to 5=high)

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Quick Survey




On a scale of 1 to 5, how would you rate your organization's performance in addressing the loss of critical knowledge?
(1=Poor to 5=Excellent)

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People Have Always Retired Or Left With Their Knowledge
What's different about this now and why should we care?

- We have the "workforce gap" – knowledge of the workforce is inversely proportional to the age of the workforce
- There is a real issue when there is not a ready and continuous stream of knowledgeable replacements due to an inability retain workforce with the critical skills to fill the gaps of growing retirement eligibles and others transitioning
- Example → Acquisition Workforce:
 - The average age of the acquisition profession according to a 2007 NCMA survey is 47 years old
 - There is competition for the remaining scarce resources among many agencies and the private sector
 - We need a deliberate means for learning, capture and transfer of the "experience" of procurement – the "know how" and "know why" of procurement



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Some Basic Understandings

- You can't capture everything that everyone knows, nor would you want to do this
- Technology cannot do this alone because it can't get what's in your head into someone else's (tacit to tacit)
- This must be part of the way you operate and work—look for a place to start where it will have a significant impact on performance
- It is a long term commitment to maintain and sustain a knowledge enabled organization
- This is not easy—look for help within your organization or from outside expertise
- Understand the multi-generational nature of the workforce

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Table Discussion

Consider the following questions:

1. Do you have a challenge? Where is the pain?
2. Does it impact your delivery of services to your taxpayers? How?
3. What is your organization doing to address these workforce attrition and knowledge loss challenges?
4. What are some of the tools and techniques your organizations are using for capturing and reusing knowledge? How well are they working?

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- Do you have a challenge?
- Where is the pain?

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- Does it impact your delivery of services to your taxpayers?
- How?

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- What are some of the tools and techniques your organizations are using for capturing and reusing knowledge?
- How well are they working?

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- **What is your organization doing to address these workforce attrition and knowledge loss challenges?**

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- **What questions should we be asking?**

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What Actions Can I Take Right Now?

- Create awareness by articulating and communicating the knowledge loss problem as a "burning platform" and focus on the alternative of doing nothing
- Decide what knowledge is critical to the organization or is necessary to improve all aspects of your organization's performance
- Evaluate how you currently capture what you know and how you reuse it and leverage what good things you already are doing
- Find ways to maintain a dialogue with those who "know" who have left the workforce
- Create a common approach for knowledge capture and reuse focused on collaborative behavior—it requires a cultural change and it is not easy

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What Actions Can I Take Right Now

- Focus on the people and the processes necessary to move knowledge across the workforce — not the technology — it's about changing behavior!
- Pick a place to start – at the leadership level or at the workforce level – and look for the early adopters in your organization
- Then, pick a pilot project to demonstrate the value of these efforts and the investment in time and resources
- Measure or value the outcome of your efforts to demonstrate success and to convince anyone that not doing this is a risky alternative

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What Are Some KM Tools And Techniques I Can Use For Capturing And Reusing Knowledge?

- “Communities of Practice” can create an ability for the workforce to share what they know across boundaries -- enabled by existing technology
- Learning Before, Learning During, Learning After
- Knowledge Repositories (Knowledge Assets) to store the “know how and know why” of processes or methods
- Leadership Transition Workshops
- Mentoring and Intern Programs



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Better Practice Transfer You Can Do This !

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Some Assumptions

- Taxpayers and stakeholders expect high performance and mission success and must trust that the procurement process will provide this:

Products and Solutions	Workforce Management and Support
Quality of Delivery	Financial success
Culture of Integrity	Innovation
- Moving knowledge by sharing better practices within an organization is a fundamental component of risk management, risk mitigation and mission success
- The procurement process requires the integration and balance of people, process, and enabling technology for successful planning, execution and management of expected outcomes
- Success in "leveraging what you know about what you do" is not accidental; it happens because all levels of an organization see this value and make it part of planning and execution, not something extra


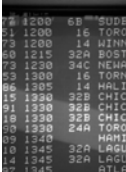

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Some Questions We Will Consider

- What is knowledge?
- Is there a difference between "best" practice and "better" practice?
- How can I transfer what I know?
- How do I know it's a better practice?
- What I can take back with me to my organization and use right away to transfer knowledge?
- Other questions we should address??

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Data - Information - Knowledge

 Data "1345UA0010 32A"	 Information "United flight 0010 leaves LaGuardia at 1345 from gate 32A"	 Knowledge "That flight is always delayed and often cancelled"
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Relationships and trust are required for knowledge transfer and re-use

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KM Concepts: Value of transferring "better" practices

New Missions & Services Quickly access and build on experience & ideas to fuel innovation

Speed & Agility Learn, decide & adapt faster than the "speed of change"

Step-Change in Productivity Accelerate the transfer and use of existing know-how

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One View of Knowledge

Information Experience

FOCUS
Actionable, meaningful, relevant

KNOWLEDGE

Best Solutions Customer Value Workforce Effectiveness Mission Performance Best Decisions

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High Performing and Knowledge Enabled Procurement Organization

People

Processes

Technology

Knowledge Management

A Leader Supported Integrated Approach

People often what they think others may need to know

- High trust
- Performance incentives
- Collaborative of Practice
- "It's all about the customer"
- Leadership demands collaboration

The talent, know-how & experience in customer acquisition is critical to success

- Fast learning processes
- Performance based process improvement
- Education and Training are integral

People & their collective knowledge are scarce, not easily visible and needs accessible

- Customer service security
- Accessible networks
- Easy to find people who know
- Virtual Collaboration

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**Some Insight to
“Better Practice” Transfer**

- Focus on ‘best’ practices often limits the transfer of better practices that could improve performance
- External benchmarking is useful but does not replace the need for “internal better practice” transfer
- There is always a wealth of better practices inside an organization that can be transferred to improve performance
- Whether or not you choose a formal or informal approach, the basic principles are the same

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Context for “Better Practices”

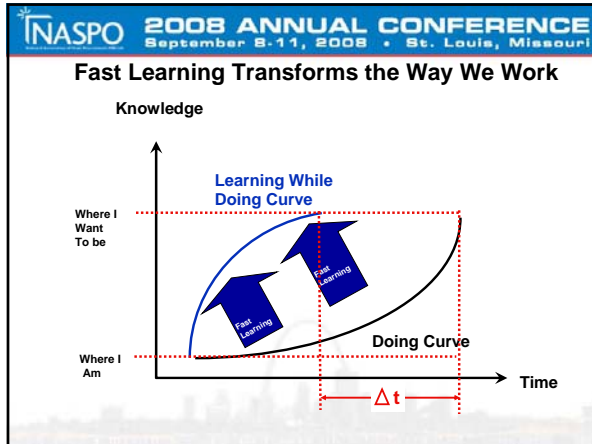
- Simple Definition
 - A repeatable activity that routinely results in improved or superior performance
- Critical Success Factors
 - **Advice and coaching** in its use is **readily available** from those who use it
 - **Documented** in a contextual manner that makes it **re-usable and adaptable**
 - **Easy to find and access**
 - **Owned by people** who have a vested interest in its use

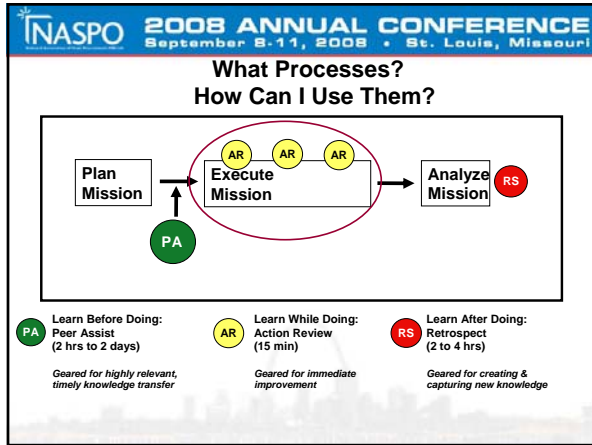
*“You don’t have a best practice unless someone else is using it.”
- Jack Welch*

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Basics for What Works & Why

- Delivering business results *while* changing behavior
- Meeting people and teams ‘*where they are at*’
- Knowing who the *customers* are for the knowledge
- Focusing on knowledge transfer, not just sharing






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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

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The Action Review Template

The screenshot shows a document titled "Action Review Session Template". It includes a header with the INASPO logo and conference details. The main content is a form with several sections: "This is a template that may be used when conducting an Action Review. Remember the Action Review should only take 15 minutes to do.", "Facilitator/Presenter", "Key Contact: (M. Number)", "Date of Action Review", "Location of Action Review", "What was expected to happen?", "What actually happened?", and "Facilitator Suggestions".

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Document for Reuse

...with the reuser of the knowledge in mind!!

- The business **context & relevant** category in which the practice/method has been used & learning occurred.
- Specific **guidance** on what needs to be addressed at each stage of the practice/method
 - Key process and procedure steps
 - Advice** in the form of guidelines, checklists, stories and FAQs containing *both local and validated common experience*.
- Links to **people** who have used the practice/method.
- A reference **library** of artifacts and documents associated with the implementation of the practice/method.
- Reference to the **Function** and/or **Community** who keeps the process current and renewed with improvements from it's continued use
- Feedback** from the end user to keep it relevant and alive.

If you really want people to use a better practice, it needs to be documented in a manner that makes it easy to understand.

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One-Pager for Sharing & Determining Relevancy

Descriptive Title

4 paragraphs on one page:

- Business process and context within which the practice/method has been applied
- What it is and what it's used for
- Results and experience from it's use
- Key learnings and advice

Plus:

- Contact information for the people who have used it
- Where to find documents and other artifacts to help in it's application
- Date

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Questions...or comments?

Can you use this?

Where would you use this?



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Case Study

Mitigating the Risk of Knowledge Loss Due to Workforce Attrition

Defense Intelligence Agency
Office of the Chief Acquisition Executive

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