

## Knowledge Transfer Strategies

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There are many ways for an organization to identify, store and transfer knowledge. Some strategies will work better in one organization than another. Some may not be appropriate for specific types of content. The challenge is to identify and develop complementary ways to further knowledge management and to transfer in an organization.

1. *Best Practice Meetings*: Too often we assume that best practices occur outside our organizations. But it is possible that the organization has its own existing best practices. These can be shared in meetings.
2. *Communities of Practice*: Groups of individuals who share knowledge about a common work practice over a period of time, though they are not part of a formally constituted work team. Communities of practice generally cut across traditional organizational boundaries. They enable individuals to acquire new knowledge faster. They may also be called Communities of Interest if the people share an interest in something but do not necessarily perform the work on a daily basis.
3. *Critical Incident Interviews or Questionnaires*: First described in the 1950's, the critical incident method takes its name from tapping the lessons of experience. A critical incident is a difficult (critical) situation (incident). By documenting the lessons of experience from the organization's most experienced performers, the organization can capture the fruits of experience. Of course, by documenting such "difficult cases" -and how they were handled- the organization is also laying the foundation for the development of a manual or automated expert system. Critical incidents provide an excellent foundation for training.
4. *Documenting Processes*: Developing a written or electronic record of a specific work process that includes the business case for the process, steps in the process, key dates, relationship to other processes that come before and after, key players and contact information, any required references and legal citations, back-up procedures and copies of forms, software, data sets and files names associated with the process.
5. *Document Repositories*: Collections of documents that can be viewed, retrieved and interpreted by humans and automated software systems (e.g. statistical software packages). Document repositories add navigation and categorization services to stored information. Key word search capability is often provided to facilitate information retrieval.
6. *Electronic Performance Support Systems (EPSS)*: Perhaps the most sophisticated of all methods for storing and transferring knowledge is a so-called electronic performance support system (EPSS). An EPSS combines artificial intelligence, an expert system, real-time e-learning methods and a computer-based referencing system. As a user encounters a problem, he or she can access all organizational policies and procedures through the referencing system, gain advice from the expert system and even learn in real time using the training computer.

7. *Expert Interviews:* Sessions where one or more people who are considered experts in a particular subject, program, policy or process, etc. meet with others to share knowledge. Expert interviews can be used in many ways, including capturing knowledge of those scheduled to leave an organization, conducting lessons learned debriefings and identifying job competencies. The U.S. Navy videotaped a multi-day session where recent retirees reflected on the reasons for success and failure. The New York State Department of Motor Vehicles videotaped a meeting with a manager scheduled for retirement to capture ideas and answers to questions.
8. *Expert Systems:* An expert system, usually automated, is organized around problems and how to troubleshoot them. A simple example is the “context-sensitive help” on most word processing programs. (If you should ever call in to the help desk of a major computer company for help, the person on the other end of the phone is probably equipped with an expert system.) Common or difficult problems are logged into the system. Advice about troubleshooting and solving those problems is also provided in the system. This approach, while requiring more technological sophistication, places information at the fingertips of even the least experienced performer, giving him other the ability to perform like a pro.
9. *Information Exchanges:* Have you ever attended a career fair? If you have, you have seen one form of information exchange. The same basic approach can be used for information exchanges. When this strategy is used, veteran performers sit at booths and dispense wisdom to less-experienced performers who visit them.
10. *Internships:* Formal arrangements where an experienced person passes along knowledge and skill to a novice who, after a designated period of time, reaches the journey level. This includes summer internships used by many State agencies.
11. *Job Aids:* These are tools that help people perform jobs in real time. They include things such as checklists, flow diagrams, reference tables, decision tree diagrams, etc. that provide concrete information to the user and serve as a quick reference guide to performing a task. Knowledge can be stored in aids and accessed through low-tech methods when the need arises. Job aids are not the actual tools used to perform tasks, such as computers, measuring tools or telephones.
12. *Job Rotation:* A form of training that involves moving an employee from one workstation to another. In addition to achieving the training objectives, this procedure is also designed to reduce boredom.
13. *Job Shadowing Programs:* A job-shadowing program is one strategy by which to transfer knowledge from one person or group to another. A less experienced performer is paired up with a veteran performer. The veteran is asked to share knowledge (and perhaps hands on practice) in dealing with the most difficult situations which he or she has faced on the job.
14. *Knowledge Audits:* Knowledge audits help an organization identify its knowledge assets, including what knowledge is needed and available. They provide information on how knowledge assets are produced and shared and where there is a need for internal transfer of knowledge.
15. *Knowledge Fairs:* These events showcase information about an organization or a topic. They can be used internally, to provide a forum for sharing information, or externally, to educate customers or other stakeholders about important information. Examples are Xerox’s “Team Day”, New York State Department of Taxation and Finance’s TaXpo and New York State Organization Development Learning Network’s (ODLN) Share Fair.

16. *Knowledge Maps*: These catalog information/knowledge available in an organization and where it is located. They point to information but do not contain it. An example is an Experts or Resource Directory that lists people with expert knowledge who can be contacted by others in need of that knowledge.
17. *Learning Games*: These structured learning activities are used to make learning fun and more effective, provide a review of material that has already been presented in order to strengthen learning and evaluate how much learning has occurred.
18. *Lessons Learned Debriefings*: These debriefings are a way to identify, analyze and capture experiences, what worked well and what needs improvement, so others can learn from those experiences. For maximum impact, lessons learned debriefings should be done either immediately following an event or on a regular basis, with results shared quickly among those who would benefit from the knowledge gained. Hewlett Packard refers to their lessons learned sessions held during and at the end of projects in order to share knowledge as "Project Snapshots". The U.S. Army calls them "After Action Reviews".
19. *Mentoring*: In mentoring, an experienced, skilled person (mentor) is paired with a lesser skilled or experienced person (protégé), with the goal of developing or strengthening competencies of the protégé. Rarely is the mentor a supervisor, since effective mentors should usually have no interest in the development of another person. Successful people have usually had one or more mentors in their career and mentors offer advice on what to do, how to do it and why it is worth doing in a situation. Such programs can, of course, facilitate knowledge transfer.
20. *Skills Inventory*: Used to generate information about the knowledge and skills individuals possess that come from previous employment or activities outside the work environment. Maybe gathered through questionnaires or interviews.
21. *Storyboards*: A storyboard is literally a group of pictures that tell a story. Think of a series of pictures on a wall or a poster that is intended to show how someone should perform in a specific situation and you get the idea. For instance, if you were trying to show someone how to perform the Heimlich maneuver, you could storyboard it. The same technique can be applied to other procedures to provide a graphic representation of what to do and how to do it. Thus, storyboards can be used in storing and transferring knowledge.
22. *Storytelling*: Most wisdom in organizations is passed on through storytelling. A story is a description of what happened in a situation to illustrate a point and effectively transfer knowledge. Most people have heard many stories about their organizations. An organizational story is a detailed narrative of management actions, employee interaction or other intra-organizational events that are communicated informally within the organization. If you hear "what really happened" in a promotion, demotion, termination or transfer, you are hearing a story. Storytelling is less structured than critical incidents but can serve the same ends. It can be a most effective way of transmitting wisdom from one person to another.
23. *On-the-Job Training*: Most organizations use some form of on-the-job training where an experienced employee teaches a new person how to perform job tasks. If this happens at random or with no consistent written materials or processes, it is called "unstructured OJT". A system of structured OJT differs in that specific training processes are written; training is scheduled records are kept of training sessions and "trainers" are given training on how to do OJT, how to give feedback and several other factors.

24. *Training:* Training encompasses a large variety of activities designed to facilitate learning (of knowledge, skills and abilities or competencies) by those being trained. Methodologies can include: classroom instruction, simulations, role-plays, computer or web-based instruction, small and large group exercises and more. It can be instructor-led or self-directed in nature.

**Sources:** IPMA News: Feb.'04, pp9-10

New York State Dept of Civil Service/Governor's Office of Employee Relations  
<http://www.cs.state.ny.us.successionplanning/workgroups/knowledgemanagement/strategies>