



# THE TRANSFER OF KNOWLEDGE

## Automating processes is critical as veteran employees retire

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Recently, we visited a land services company that had run out of cabinet space and now stores its records in boxes marked with handwritten dates. Not surprisingly, this organization experiences a host of inefficiencies, including lost or misplaced records. We have also seen organizations that manage their key assets—hundreds of paper maps for both old and new projects—by updating the important project details like easement restrictions and contact information on sticky notes attached to those maps.

Now imagine being a young professional, someone who has grown up with electronics and smart devices, having to dig through file cabinets or boxes in search of an important file or map. The reality is, not only is this perceived as an outdated mode of documentation, it makes the transfer of knowledge more complex and cumbersome than it needs to be.

### An Aging Workforce

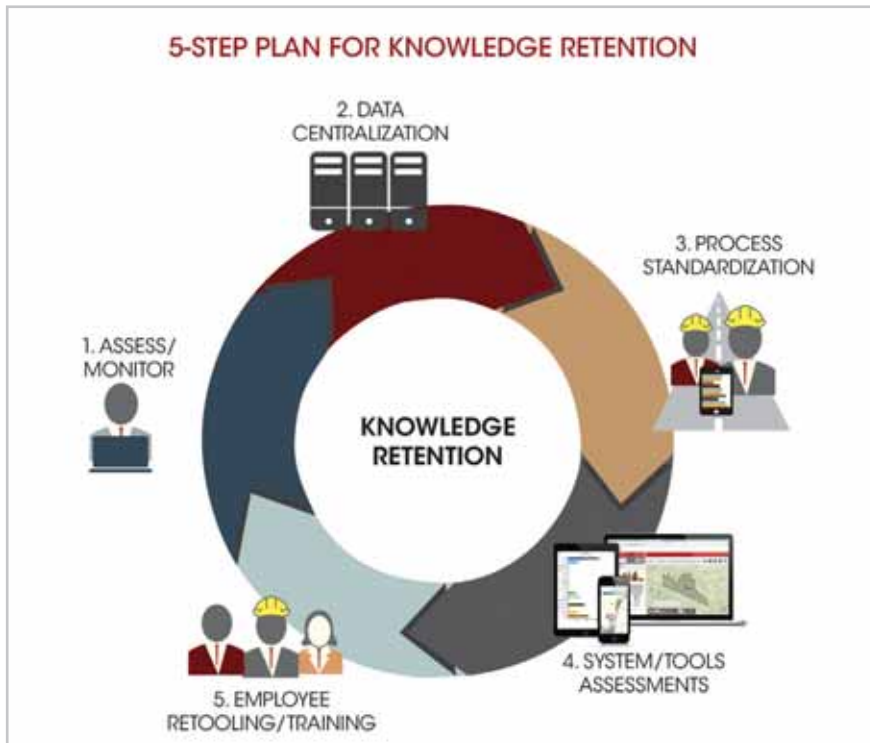
For employees ready to retire, it is cause for celebration. However, for their employers, it can mean a difficult road ahead, especially for those who have not taken adequate steps toward knowledge retention.

It's a well-known fact that America's workforce is getting older. According to the U.S. Bureau of Labor Statistics, by 2020 more than 25 percent of U.S. workers will be 55 or older, continuing a trend since 2000 of an increasing number of older employees in the workforce. And the public sector will be hit even harder. The International City/County Management Association reported that 63.3 percent of city and county managers and other chief appointed local officials were older than 50, while 25 percent were older than 60. The trend has been named the "Silver Tsunami."

It is understandable that 80 percent of human resources professionals identify the aging workforce as their biggest worry. Less than half of those professionals, though, say their organization has a plan to address it.

### Impact on Workforce

The aging workforce is fundamentally changing American society, and its impact on our economy is profound. Workers approaching retirement possess unique and oftentimes undocumented knowledge of project history and complex processes. When those employees retire or leave for other reasons, the organization must not only replace them, but somehow transfer their industry knowledge and project expertise. It may take two years to sufficiently train a new employee on company operations and procedures, but it is unrealistic to expect someone to attain in two years the level of



Organizations can be proactive by focusing on steps to achieve knowledge retention.

recipients and payment amounts. It also offers invaluable mobile applications for working in the field. A detached application is available when connectivity is unreliable, and GIS mapping can broaden the use of information that is gathered. Organizations gain real-time information and flexibility while authorized personnel have instant access to project details. With reports and software dashboards to communicate a project's progress, issues and bottlenecks, management has the tools they need to facilitate quick decision-making.

### Process Standardization

In trying to keep up with an increasing workload, employees will typically devise their own internal tracking procedures. It's not uncommon for agents to hand write notes after meeting with a landowner. In communicating project updates to coworkers and supervisors, email may be used to explain the specifics of these landowner interactions. But if each employee is using a different method of tracking and communicating information, an organization's overall efficiency will suffer over time. While building consistency may seem like an impossible feat, standardizing internal processes can help an organization create efficiencies and build institutional knowledge.

Process standardization is the collection and implementation of best practices – the organization's processes, job duties and project development. It is the most efficient way to produce a product or perform a service in a consistent fashion and achieve a desired rate of productivity. It goes beyond functioning as a work instruction document because it is created by the process users, those who are on the front line and understand what's needed. Centralizing best practices improves efficiencies in costs and schedules that lead to a stronger bottom line, achieving organizational strategies and objectives, and a durable outlook for the future. Transitioning to standardized processes also leads to a higher degree of customer satisfaction. From reducing errors to streamlining training, the benefits are invaluable.

project, industry and organizational savvy of a retiring employee with decades of experience.

Too often, challenges of great magnitude force the organization into an urgent decision. In the heat of a crisis, however, the decision and its timing may not be the best. There can be undue stress within the organization. Progress on a billion-dollar project can be set back weeks, possibly months. Confidence among the organization's creditors and shareholders can be shaken. The good news is that more companies are facing this challenge head on by committing resources to centralizing their records management system and standardizing their organizational, job and project development processes.

### Creating a Centralized Database

Information is an organization's most valuable asset, yet there continues to be a reliance on paper for documenting new project information and historical records. This dependency not only leads to inefficiencies and errors, but it limits the staff's ability to access and manage important data. For example, if one field agent is keeping their own landowner records, there is the potential for another agent to duplicate their efforts. Imagine being a landowner who has been contacted by multiple agents within an organization. This can potentially disrupt the entire

negotiation process and set a project back by weeks or even months. Furthermore, credibility may be forever lost.

While continued reliance on antiquated systems can stunt an organization's progress, a technology upgrade can help. The most efficient way is to convert all records and paper-based documents into a central database. This conversion is facilitated in large measure through data migration, which involves transferring information from various sources and formats into a single software solution. The process involves merging the organization's paper records, maps, photos, jpg files, pdf files, word files, spreadsheets and other data into a centralized web database. During a data migration, errors can be corrected and data from the initial source can be reformatted without loss or damage to the original information. Once centralized, the information is safely stored, easily updated and accessible to staff. And because it eliminates uncertainty in searching for records and supplies a historical perspective, employee training can be streamlined.

A web-based central data system increases the value of information because it eliminates silos. In place of using spreadsheets to manage property information and lease agreements, or using email to issue new project notifications and reports, the system automates these tasks according to the desired schedule,

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## Efficiencies in the Field

In both the public and private sectors, standardization adds discipline to the organizational culture. It supports quality standards and auditing requirements, and can evolve with the organization and its projects and technology. By converting historical data and project information into a central database and adding mobile technology and other capabilities, the organization can streamline its processes for its field agents. Software solutions are available that can be used to standardize workflow and job tasks. And with a web platform's dashboard-focused interface, users gain easy and secure access to the database. Existing project and organizational information can be quickly retrieved, edited, approved and uploaded into the system with an audit trail of any changes.

While working in the field, acquisition agents can use their mobile devices to report their location and access all current information on a parcel. Agents can retrieve a landowner's contact information in seconds without carrying around files of assigned tracts. Notes can be added quickly to a landowner's file, and pictures of structures, land improvements and infrastructure items that may be of concern can be uploaded and synced to their assigned tracts in minutes. The software prompts users for a report of any contact with the landowner and for information on existing structures or obstructions in the right of way. This is especially helpful for those who may be on the road for several hours talking to multiple landowners.

## Managing Inspections

After right of way agreements have been reached and new infrastructure constructed, there is a need to manage property encroachments, inspections and repairs. Without standardized processes, there can be too much guesswork. Records of past inspections recorded on paper or spreadsheets may be inaccurate or outdated. An inspection may have

been performed, but if it wasn't properly recorded, another crew could be assigned to the same area, creating duplication of effort. Details of inspections can vary from person to person, and those inconsistencies can be detrimental to an organization's effectiveness.

Utilizing a web platform and dashboard interface for managing inspections is another example of how technology can standardize processes and facilitate knowledge retention. A web-based system offers the ability to assign inspections, manage workflow, and eliminate potential duplication of efforts. Inspection parameters previously known by only one or two employees become accessible to others. A calendar of inspections and maintenance checks can be programmed so workflow reminders are issued automatically.

The same capabilities are possible for cutting trees, mowing, spraying and other requiring vegetation maintenance of a project area. With mobile technology, agents can receive automated notifications in real time. They have access to landowner instructions or preferences. For example, one landowner wants the crew to spray on his property, while another property owner does not. Using a web database and software that standardizes processes reduces the potential for landowner issues and solidifies an organization's credibility. Once the work is completed, agents are prompted to upload the results, along with any helpful notes, into the central database. An easily accessible record of work done on infrastructure or a specific parcel within the project is maintained in perpetuity and constantly updated, making any transition in staff a seamless one.

## Taking a Proactive Approach

The organizational challenges related to an aging workforce and a lack of knowledge retention have been years in the making. And as the vast majority of human resources professionals attest, few organizations have been working toward a solution.



Without a centralized records management system and standardized processes in place, an organization is at a huge disadvantage when the time comes to transitioning from experienced employees to new hires. Undocumented information known only by retiring veterans leaves the remaining staff questioning the accuracy of the organization's records. Oftentimes they will create their own record-keeping system. But that can duplicate work.

By spotting the warning signs and inefficiencies and responding appropriately, an organization can take proactive steps to achieve knowledge retention. The positive actions taken today could provide an edge over the competition. In a larger sense, the organization will have helped establish a foundation for the success of future generations of the American workforce. 🌟



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