The Dixon Knowledge Transfer Framework

Common Knowledge Associates

Nancy Dixon

Transferring knowledge from one part of the organization to another is at the heart of knowledge management. But a general call to encourage more knowledge sharing or transfer is not very effective because there are many ways to transfer knowledge. You need to be sure that you are selecting the best method for what you want to accomplish. There are two questions that influence the choice of method.

1. **What is the transfer problem you are trying to solve?** For example, do you want to:

- transfer the knowledge that has been learned in one project to other projects?

- transfer the knowledge of a retiring expert to his/her successor?

- transfer the knowledge gained from a critical event, such as the loss of a contract?

2. **What type of knowledge do you want to transfer?**

- **Explicit** – is "know what," the facts and algorithms that can be written down so others can both understand and make use of the knowledge. Examples are SOPs, job aids, and well-documented process steps.

- **Implicit** – is 'know how" A professor or a book can teach you the "know what," but "know how" is learned through experience. A skilled interviewer can ask the right questions to make the "know how," that is in someone's head, explicit enough that others could use it, for example, the rules of thumb the person uses, insights about a difficult client, short cuts to use in fixing a troublesome machine, etc. When they are well facilitated, Communities of Practice (CoPs) can do a great job of transferring implicit knowledge in response to a specific question someone asks.

- **Tacit** – is deep knowledge, what a person knows, but often cannot articulate; it is what is often referred to as judgment. Tacit knowledge can only be learned through observation of a master or being coached by a master. Examples of tacit knowledge are, what makes one speaker engaging and another less so, how a conductor acts to get the best from an orchestra, what a skilled facilitator does to help a group reach agreement.

Below is the Knowledge Transfer Framework I have built for working with my own clients. It starts in Column 1 with a list of knowledge transfer needs that I frequently hear from clients. Column 2 lists the type of knowledge associated with each need. Column 3 outlines how that type of knowledge can be harvested and Column 4 outlines how it can be transferred to others.

Harvesting knowledge is only the first step in knowledge transfer. Once it is harvested there must still be a process in place to make it available to those that need it, the 4th column. And if it is tacit knowledge there needs to be an additional process to assist those that need it to internalize it. However, in the most efficient and well-designed transfer processes, harvesting, making available, and internalizing can occur simultaneously.

Problem the organization is facing	Type of knowledge	How the knowledge is harvested or captured	How the knowledge is transferred
Retaining the critical knowledge of a senior manager or niche specialist who is leaving the organization	1.Explicit	Expert completes a well designed **written form** which includes responsibilities and critical contacts	Transfer occurs by **studying the completed document** (use when no time is available for lengthy interviews)
	2.Implicit	**Interviews** by a skilled knowledge interviewer joined by the replacement for the position	Transfer is accomplished 1) **during the interview** and after by 2) referring to **concept maps** and 3) **notes** taken during the interview.
Build the capacity of a group or level of employees	1.Implicit	**Structured interviews of expert by nextperts** (near experts) facilitated by a skilled knowledge coach	Transfer is accomplished **during the interview** and after by referring to **concept maps** and **notes** taken during the interview, and by engaging in **designed practice**
	2.Implicit	Develop challenges originating the field to implement in a series of videoed **Challenges in which judgment is required** – online or in class/workshop	Learners **view a video** of the challenge which stops before the resolution and engages learners in a **discussion with others** about what they would do if addressing the challenge –online or in class/workshop
	3. Implicit	Design and coach an expert in how to conduct a **Masterclass for nextperts**	**In the Masterclass** the expert offers a cases which nextperts discuss in small groups and are also coached by the expert
	4.Tacit	**See Do Teach** where experts are paired with nextperts to follow and observe the expert in action	**A three part process** conducted over several weeks to 1) **observe** then reflect with the expert 2) **be observed** in action by the expert, then reflect, 3) to **teach** another nextpert and then reflect
	5. Tacit	**Critical Incident interviews** of experts. **A five-step process** conducted over several days to gather knowledge related to critical decisions the expert makes with nextperts present.	In the **Critical Incident interviews** and after by 2) referring to **concept maps** and 3) **notes** taken during the interview.
Transfer what has been learned among projects all working on the same issues	Explicit and Implicit	Community threaded **discussions summarized** and placed in a **wiki or toolkit**	**Engage in a community of peers** where questions and answers to mutual problems are shared and later reference to wiki or toolkit
Transfer of curated best practice for a critical task or process to all who work on that proces	Explicit and Implicit	**Lessons learned for a specific process or task** sent in by employees and curated by a specialist or team	Organized by steps in the process or task and stored in a **repository or wiki**
Adapt what has been learned in one team to team members in another context	Explicit and Implicit	**Conduct a Peer Assist** meeting between a learning team and the originator team, where the meeting is formatted by the questions of the learning team.	The transfer takes place **during the peer assist meeting.**

©Nancy Dixon, 2017