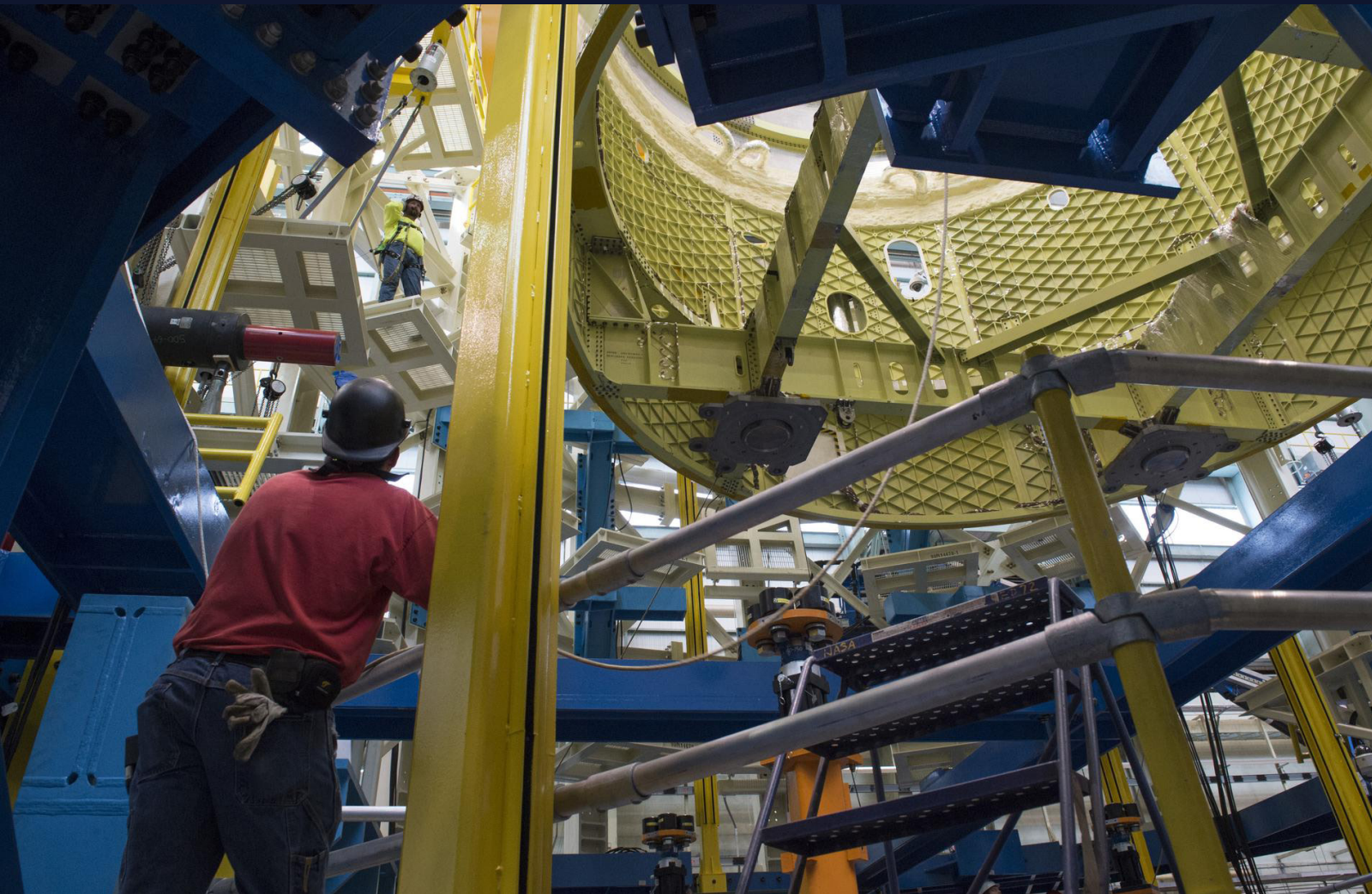


Sustaining Knowledge Through Transitions Guide

Created with the input of
the **NASA CKO Community**



When teams experience rapid transitions, there are key steps that leaders and group members can take to determine which knowledge gaps must be resolved, provide support for team members who are learning new roles, and maintain the team's knowledge to move forward effectively.

Although the breadth of experience and expertise that each individual brings to their work cannot be replaced, teams can take action to mitigate the impacts of individual transitions.

This guide provides an overview of practices and tools for leaders and team members to navigate the process.

Each step should be led by an organization leader or a person designated by the leader to ensure knowledge is adequately captured and coordinated through the transition period; however, all team members can use this guide to contribute to the team's shared knowledge.

Step 1: Assess Current Status



Coordinate departures to the extent possible

Communicate with the departing team member to determine key processes and activities they perform. Ask them to conduct a “legacy” discussion with the team to share insights into their current work, career accomplishments, and tips for success. Check with the team member to see where they store their work documents and make sure they are shared with the team.

As time allows, adapt role-based tools from the [knowledge continuity guide](#) to support the transition. Please see best practices for offboarding from the NASA OCIO [here](#) and a [Microsoft 365 Offboarding Checklist](#) that can be used to make sure documents and crucial information are stored effectively.



Questions to consider:

- What will break if the departing team member is not there?
- What unique knowledge does the departing team member have?

Assess the gaps

Within a few weeks of a team member’s departure, work with the remaining team members to identify gaps in expertise that may occur as a result of the change. Keep in mind that this may include recognizing years of experience, relationships and points of contact, and policy and process knowledge.

If multiple changes are occurring at once, a [knowledge audit or knowledge inventory](#) may help to surface the highest priority gaps.



Questions to consider:

- What specialty areas were affected by recent departures?
- What expertise is available among the team and what knowledge do we have in place that can sustain any gaps?



Inventory commitments and current team knowledge

Review activities conducted by the departing team member(s) and identify areas that can be readily covered by others. When a 1:1 transfer is impossible, ensure that the different people taking on related elements of a departing team member's role are aware of each other's responsibilities and can identify potential overlaps.

A [knowledge map](#) can help to show how different individuals are involved in a particular process.



Questions to consider:

- What is the team's current knowledge and expertise versus the knowledge needed to meet commitments?
- Are there knowledge transfer artifacts or known processes that can help the current team?

Step 2: Establish Knowledge-Focused Practices to Provide Support

Develop consistent lines of communication

Hold regular recurring meetings with the team to review challenges together, get team feedback and suggestions, and determine how best to make use of group knowledge.

Apply [intentional meeting design practices](#) to support open communications and reduce organizational silence. Document these discussions with good meeting notes distributed to the team and utilize best practices for conversation to elicit ideas from the entire team ([A Guide for Capturing Knowledge and Lessons Learned in Meetings](#)).



Questions to consider:

- What different techniques can be used to elicit feedback from the entire team during meetings?
- What is the best way to distribute meeting outcomes for the team?



Provide knowledge supports

Develop a **knowledge strategy** to ensure the most critical knowledge remains available for the team to access and use. Ensure team members in stretch assignments are adequately supported by managers, mentors, and peers, and that they can **recognize limitations** appropriately.

To the extent possible, limit or reduce requirements for processes. Divide work assignments up among peers to ease the increased workload. Where possible, stop by in person to check in with people who might need support.



Questions to consider:

- Do you have strong communication lines with all team members in order to receive requests for support?
- Do team members have an appropriate sense of their limitations and areas where they should request help?

Highlight Resources

Develop an inventory of available knowledge documentation and identify any barriers to desired team knowledge and required level of capability. Identify available resources to help team members taking on new roles to resolve their own questions.

These can be useful points of contact inside the team or external to the team, experts to consult for complicated issues, training to resolve any gaps in understanding, formal or informal **mentors**, process and **task documentation**, and other sources of knowledge.

Watch “How to Lead Change” for additional tips. View slide deck [here](#).



Questions to consider:

- Are there any barriers to knowledge continuity that can be resolved through training, relationship networks, experience, or rearrangement of other tasks?
- Where should someone go first with a question? Is there a way to request the “collective knowledge” of the team?

Step 3: Maintain Knowledge-Sharing Activities for Long-Term Value



Reinforce good practices for knowledge sharing among team

Explore the best ways to celebrate the [knowledge sharing practices](#) of the team in meetings. Make it a point to cover the team's progress in regular meetings and take time to complement knowledge sharing efforts such as [working openly to support knowledge transfer](#).

Support team participation in learning opportunities with experts and invite guest speakers to share insights on how they accomplished their work.



Questions to consider:

- What are our team's shared stories?
- Where can we highlight and store our team's lessons learned and best practices?

Sustain knowledge continuity through future transitions

Consider methods for capturing the team's knowledge that can be built into normal work activities. Embedding [knowledge sharing and capture](#) into already existing processes will encourage the team to collaborate.

Solicit and point out examples where the sharing of team knowledge helped to solve problems or save time to show the value and encourage the team.



Questions to consider:

- How can we build into our normal work routines the capturing of our team processes, best practices, and lessons learned to mitigate against the pain of future team disruptions?
- How do we celebrate and recognize the team's capture of crucial knowledge?

Additional Support

For additional support, examples from other teams, and templates, please reach out to your **Center or Mission Directorate Chief Knowledge Officer or the NASA Chief Knowledge Officer team.**

