

# MILESTONE

*Providing Stepping Stones  
Along the Path to Success*



A WOMAN-OWNED  
SMALL BUSINESS

KNOWLEDGE  
TRANSFER LIFE CYCLE

At the conclusion of the project, a vital task is transferring all knowledge, processes, and skills from the project team to the customer or their representative. The project is considered successful only if the customer can effectively utilize the output. This knowledge transfer should be completed by the project's end, allowing the customer to assume responsibility for using the project's deliverables.

The five stages of the Knowledge Transfer Life Cycle ensure that the project knowledge is effectively transferred.

### ***Identifying***

Knowledge transfer begins with identifying the specific knowledge that others will need most. It focuses on prioritizing the topics and passing along the correct and highest-priority knowledge. The customer doesn't need to know every minute step used to create the output. However, they do need to know how to use the output to its full potential and learn how to address problems that may arise.

### ***Capturing***

Capturing or organizing knowledge can involve extracting tacit knowledge from a person's head and presenting it in a form such as graphics or narrative to facilitate transfer. This includes shifting the knowledge into a format that benefits the learner. The technical experience of the developers often exceeds that of the customer. Make sure the information is translated into an easily understandable language that the customer can understand.

### ***Sharing***

How will the knowledge transfer happen and benefit the learner? Sharing allows the learner to see the process or steps and then follow them with oversight. Determine the type of teaching tool or format that will effectively convey the information, such as virtual, face-to-face, check sheets, shadowing, or mentoring.

### ***Applying***

Applying shifts the learner from merely hearing and seeing how something works to allowing them to take responsibility for using the new skills and training. It evaluates whether the person understands or not by allowing them to use the output under the supervision of the development team. This hands-on approach is the real test of whether the knowledge was correctly transferred.

### ***Assessing***

Assessing focuses on the benefits of knowledge transfer. What value does the knowledge have to the learner? Does learning the new knowledge help with: being more cost-effective, running processes faster, or reducing waiting time for decisions?

Without effective knowledge transfers, the customer is left with an output that they don't know how to use or fully leverage. This gap can lead to underutilization of the work, reducing its overall value and impact. The team should be proud of the work they accomplished and, at the same time, eager to ensure that the customer not only understands the output but also feels confident in applying it effectively in their own context. Providing comprehensive training, clear documentation, and ongoing support can make a significant difference in achieving successful adoption and maximizing the project's benefits.

## **UPCOMING FREE WEBINAR**

### **THE CRITICAL ROLE OF KNOWLEDGE TRANSFER IN PROJECT ENVIRONMENTS**

**FRIDAY, SEPTEMBER 5**

**10:00 - 11:00 AM CST**

**1 PDU**

**TO REGISTER, GO TO**

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## **SATISFIED CLIENT OF THIS COURSE**

**FEDERAL AVIATION  
ADMINISTRATION**

# KNOWLEDGE TRANSFER IN PROJECT MANAGEMENT - 1 DAY

## SECRETS TO INCREASE TRANSFERRING KNOWLEDGE FROM THE TEAM TO THE CUSTOMER

***PDU's - 6.5***

**PMI's Talent Triangle Breakdown**

Ways of Working - 3.75

Power Skills - 0.50

Business Acumen - 2.25



virtual  
instructor-led

**Course Description:** Transferring Knowledge happens in project management to transition knowledge from the project team to the Customer. It is one of the best ways to educate current employees about new processes, procedures, and knowledge from a project or new initiatives. Knowledge transfer is more than on-the-job training; it means replicating the actions of an experienced worker.

Knowledge transfer in projects rarely happens organically but must include a transfer of knowledge plan with milestones for learning and understanding the new knowledge. Knowledge transfer can occur throughout the project or at the end prior to closing out and includes both tacit and explicit knowledge.

### **Course Objectives:**

**Objective 1: Understand an overview of knowledge transfer**

- Define knowledge transfer
- Barriers to knowledge retention
- Benefits of knowledge transfer
- Create goals for knowledge transfer

**Objective 2: Defining explicit, tacit, and lost knowledge**

- Determine the impact of lost organizational knowledge
- Understand the types of lost organizational knowledge
- Classify types of lost organizational knowledge

**Objective 3: Analyze the characteristics of a good knowledge transfer program**

- Appraise types of knowledge
- Create a continuous improvement process for knowledge transfer
- Determine the cost-benefit of transferring knowledge

**Objective 4: Evaluate the type of learner**

- Identify strategies for a resistant learner
- Understand the difference and fallout of push/pull learning
- Evaluate shallow learning

**Objective 5: Determine which SMEs possess knowledge in specific areas**

- Create a Skills Transfer List by SME
- Create a knowledge transfer strategy
- Work with current experts and SMEs

**Objective 6: Evaluate techniques for transferring knowledge**

- Evaluate the current knowledge retention strategies
- Differentiate knowledge transfer which requires training

**Objective 7: Select the criteria for documents and archiving**

- Audit new knowledge usage
- Meet the documentation goals and objectives for the project



A WOMAN-OWNED SMALL BUSINESS (WOSB)



*Providing quality, customized training and consulting services that inspire, educate, and equip organizations to be better tomorrow than they are today.*

**DR. KEITH MATHIS, PMP, PMI-ACP, CSP-SM, CSP-PO**  
**WANDA MATHIS, M.ED. PMI-ACP**

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Since 1993, The Mathis Group has been helping organizations change worker productivity and behavior.

**PROJECT MANAGEMENT**  
**MARKETING**  
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The Mathis Group provides training and consulting that will impact the organization and individual while maintaining an outstanding reputation for success and integrity.

### **VALUES STATEMENT**

Every person has worth and should be treated with respect.

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- Project Management
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  - Strategic Planning
  - Executive Coaching
    - Performance
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  - Leadership
  - Customer Service
  - Supervisory Leadership
  - Hybrid Project Management

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