



CTRL+CLICK to view responses. In PDF format, please scroll to view responses.

[What is Duly Knowted™ and “what’s in it” for my organization?](#)

[What positions or roles are considered good candidates for the DK process?](#)

[Can we choose from a menu of services?](#)

[“How do we get a handle on what should be captured? How do we avoid going too broad or too deep with the ‘capture net’?”](#)

[“How will I know you are asking the right questions? You may understand how my highly technical business works in the most basic sense, but how can we feel confident that you’ll be able to uncover information we don’t already have?”](#)

[We already have a data base, and experts’ files are stored in our system. We’ve already done work with lessons learned and communities of practice. How does the Duly Knowted process take us further?](#)

[At the end of the project, what shows up on my desk? What are the deliverables?](#)

[How long does this take? How much of our time is required?](#)

[The economy is stressed. Some of our people were planning to leave, but not now. Does Duly Knowted make sense at this time?](#)

[What if the person leaving is not willing to participate, doesn’t have the time, or won’t commit to the process?](#)

“What is Duly Knowted™ and ‘what’s in it’ for my organization?”

Duly Knowted™ (DK) is a facilitated, one-on-one capture process that maps, documents and organizes vital knowledge pieces and networks held by partners, department veterans, experts or other unique knowledge holders—in advance of those individuals leaving your organization.

Duly Knowted works directly with knowledge holders. Its focus is the information and guidance that is *least likely* to have been documented and *highly likely to be needed* following a knowledge holder’s planned or unexpected departure.

“What positions or roles are considered good candidates for the DK process?”

Think about individuals whose work is unique in your business, whose processes and knowledge are not highly redundant in other groups or people. Or, individuals whose information networks are extensive. “Go-to” people are good candidates.

Time spent with your business is only one gauge. For example, a Sales VP onboard for one year will have accumulated information and developed networks that need to stay with you.

Also, think about people whose primary activities are described with terms such as:

- Diagnose/troubleshoot
- Grow-expand
- Operates (especially facility or special equipment operations)
- Manage systems; integrate systems
- Recover-repair
- Innovate-create-invent
- Lead/coordinate

“Can we choose from a menu of services? How customized are the deliverables?”

Yes you may choose and the deliverables are customized. The DK process consists of a variety of modules or discrete activities. Rarely would all of them be required or apply to your situation.

Together we’ll determine which deliverables make the most sense for your situation; we’ll decide what constitutes a complete product for your needs.

“How do we get a handle on what should be captured? How do we avoid going too broad or too deep with the ‘capture net’?”

No process can capture all of anyone’s knowledge or every node in an expert’s network.

Given this fact, one benefit of a facilitated process are the up-front, boundary-setting discussions with stakeholders—those remaining in the business. Duly Knowted works closely with stakeholders to define what information and knowledge areas are of most value to the company and most practical to capture given the project scope.

The knowledge holder’s vantage point also guides the process; their perspective on what’s missing, what’s needed and where important gaps are likely to show up must be considered.

“How will I know you are asking the right questions? You may understand how my highly technical business works in the most basic sense, but how can we feel confident that you’ll be able to uncover useful information we don’t already have?”

The process is based in part on *your questions*. During our first work phase, we interview others who have worked with the expert or who will carry on her responsibilities—stakeholders. We coordinate stakeholders' questions with our questions. In some instances or for particular interview segments, we might ask stakeholders to participate with us.

The DK process asks questions you might not ask; it uncovers things you might not uncover. Then, it organizes and packages the results. For example, if we are discussing system implementation issues and ask the knowledge holder to generate and prioritize an issues list, we are not going to judge or question the list that results. But because our role is facilitative, we *will* push for the priorities and then for the *rationale*—something like a coach might do. “OK. We cannot have six #1 priorities. Let’s break this down.” (Ten more sit ups please!—now!)

What we bring to the process is our ability to get *to* the information; then with the expert’s input, structure it in useful ways.

“We already have a data base and experts’ files are stored in our system. We’ve already done work with lessons learned and communities of practice. How does the Duly Knowted process take us further?”

Good work on your part! Whenever possible, we want to leverage work you’ve already done and build on knowledge capture steps already taken, even if those efforts are several years old.

Annotation and commentary on your examples and processes takes you several steps further. For example, you could be looking at your expert information for best practices or work samples for re-use or for training. Do you know *what it is exactly* that makes the examples “best of’s” vs. “typical”? That would extend your previous work. Updating your expert’s information and making sure it applies to your latest initiatives and directions is another way.

“At the end of the process, what shows up on my desk? What are the deliverables?”

Deliverables could include those listed here. Other deliverables tailored to your engagement are likely to emerge. What do *you* think you need?

- Process documentation
- Process validation/verification
- Network maps
- Storage/locator maps
- Action recommendations and priority lists
- Lessons learned summaries
- Competencies-job description review and updates

- Formal and *informal* learning content
- Mentoring briefs and outlines

“How long does the process take? How much of our time is required?”

Ideally the process launches (approximately) ten-twelve weeks prior to the knowledge holder’s departure. If your time frame is short, we can work to a more compressed schedule. Our goal is to complete our work at least two weeks in advance of the expert’s departure.

Parts of process are flexible. The time commitment can be distributed over X number of hours per week or concentrated into a two-three day site visit. The DK process is designed to keep everyone’s involvement as efficient as possible.

The number of hours and the process’ duration depend on (1) how much time remains in the knowledge holder’s tenure and (2) the deliverables we agree to. DK modules or activities are organized around the knowledge holder’s schedule--he does need to be actively engaged! Any transition or capture work you’ve already accomplished is certainly leveraged.

The process also requires some time from team members. Depending on the knowledge holder’s role in your company, administrative assistants or other staff may be able to support the effort.

“The economy is stressed. Some of our people were planning to leave, but not now. So why does Duly Knowted make sense at this time?”

Certainly there have been changes and impact to work patterns and planned retirements. This should be viewed as a *temporary* reprieve giving businesses a bit more time to identify key knowledge components, capture them, then package and apply them. So yes, Duly Knowted makes sense provided the process is well positioned and not perceived as pushing anyone out the door.

Duly Knowted is about specific individuals; parts of their knowledge and personal best practices. Individuals have unique circumstances. Plans change and opportunities arise. Assuming that anyone will still be with your organization in six or nine or twelve months might not be a good assumption!

“What if the person leaving is not willing to participate, or doesn’t have the time or won’t commit to the process?”

The Duly Knowted process does not work well with a knowledge holder who is resistant or cannot commit to the process. A bit of hesitancy can be overcome; and to some extent we can work around time issues. But the basic willingness and intention to provide good information and to assist the organization and its mission needs to be there.