KNOWLEDGE TRANSFER CASE STUDY
INDIVIDUAL SUNSET PLANNING

A harmonious sunset for a retiring Senior Engineer

SITUATION: We received a call from a director who was facing a significant challenge: a senior engineer with 28 years of experience was retiring. This engineer held critical knowledge about several pivotal projects, but previous attempts to get him to share this information had been unsuccessful. The director was concerned that no successor would be in place before the engineer's retirement, which was only three months away, potentially jeopardizing ongoing work.

Our Solution: Sunset Coaching Package

To address this issue, we used our sunset knowledge transfer process. We began with interviews involving the director, team members, senior engineer peers, and the senior engineer himself. Through these discussions, we identified three primary areas of focus:

- **Decision-Making Processes**: Understanding how the engineer facilitated decisions between divisions, which was crucial for project progression and meeting deadlines.
- **Historical Design Challenges and Accommodations**: Identifying past design issues and accommodations and determining where this information was documented.
- **Future Projections and Forecasts**: Gathering the senior engineer's insights on future project developments and potential challenges.

With these primary focus areas in mind, we created a two-month knowledge transfer plan and conducted a series of targeted knowledge transfer sessions.

Before each session we met with the senior engineer to outline the agenda and gather relevant documents and reference material. This information was then shared with the director and team members to ensure the right participants attended each session.

Knowledge Transfer Sessions

Connections
Facilitated a series of sessions with the senior engineer, the "second-in-command," and applicable peers. The sessions focused on effective communication strategies, decision-making protocols, and key stakeholders for each project. Created a comprehensive list of key stakeholders and monitored introductory meetings between the second-in-command and these stakeholders.

Overcoming Obstacles
Facilitated a session where the senior engineer described key challenges and accommodations made for projects completed in the last five years. Participants asked questions and a follow-up meeting was conducted to discuss how to apply this new knowledge to current and future projects.

Future Forecast
To capture the senior engineer's insights on upcoming projects and potential challenges, we facilitated a dedicated session with company leadership. During this session, the senior engineer provided a comprehensive overview of current high-priority projects, highlighting areas of success and potential risks. Additionally, he shared his thoughts on opportunities and challenges that the organization might face in both the near and long-term future.

Result

As a result of this sunset knowledge transfer process, the organization achieved several key outcomes:

- **Continuity of Work**: The detailed sessions ensured that critical project knowledge was successfully transferred, allowing work to continue seamlessly after the senior engineer's departure.
- **Empowered Team**: Team members gained a deeper understanding of decision-making processes and historical design challenges, enhancing their ability to handle future projects.
- **Future Preparedness**: The insights on future projections provided valuable guidance for upcoming projects, enabling the organization to plan more effectively.

Details in this case study have been slightly altered for client confidentiality.