

KNOWLEDGE TRANSFER CASE STUDY

TEAM TRANSITION PLANNING

A new frontier for an Operational Excellence team

SITUATION: An Operational Excellence team was set to be disbanded in one month. The team's director and three senior change consultants were leaving the organization, while the remaining four change consultants were being relocated from headquarters to various regional offices. Concerned about the potential loss of critical knowledge and continuity, the VP of Operations reached out to us for assistance in ensuring a smooth transition.



Our Solution: Team Transition Package

We began by interviewing the VP of Operations to gain a clear understanding of the goals and desired outcomes of the organizational changes and new roles and responsibilities. We then conducted interviews with the team director and the change consultants to identify critical team expertise and knowledge to transfer.

We identified the following areas of focus:

- **Annual Operational Excellence Awards Celebration:** Each year, the Operational Excellence Team planned and executed an awards celebration. The transition required detailed knowledge of vendor contacts, timelines, the process for selecting judges, and the criteria used for choosing award winners.
- **Operational Metrics and Performance Dashboards:** The Operational Excellence Team was responsible for developing and maintaining key performance indicators (KPIs) and dashboards that tracked the organization's operational performance. These tools were crucial for monitoring progress, identifying areas for improvement, and making data-driven decisions.
- **Best Practices for Continuous Improvement Initiatives:** The departing consultants developed and refined a set of best practices for continuous improvement initiatives across the organization. These practices were critical for maintaining operational efficiency and driving ongoing improvement.

A comprehensive one-month knowledge transfer plan was developed.

Result

- **Preservation of Critical Knowledge:** The detailed playbook developed for the Annual Operational Excellence Awards Celebration ensured that the event planning and execution could continue seamlessly. This allowed the organization to maintain its tradition of recognizing and rewarding excellence.
- **Continued Operational Insight:** The new team in charge of the Operational Metrics and Performance Dashboards were able to continue to monitor and report on key performance indicators, enabling data-driven decision-making to proceed without interruption.
- **Consistency in Continuous Improvement:** The guide on best practices for continuous improvement initiatives provided a clear and consistent framework for ongoing projects. This not only preserved the operational efficiency gains achieved by the original team, but also empowered the remaining and incoming consultants to drive future improvements with confidence.

Knowledge Transfer Sessions



Process Development

We facilitated a series of sessions to create a playbook with procedural templates to help plan and execute the Annual Operational Excellence Awards Celebration.



Under the Hood

We facilitated a session to walk through the data sources used in Operational Metrics and Performance Dashboards and steps for performing and communicating updates. Common questions regarding data interpretation and things to watch out for were also covered.



On the Same Page

We facilitated a session to help document these best practices and created a comprehensive guide for the remaining and incoming consultants to ensure consistency regarding best practice approaches for continuous improvement initiatives.

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