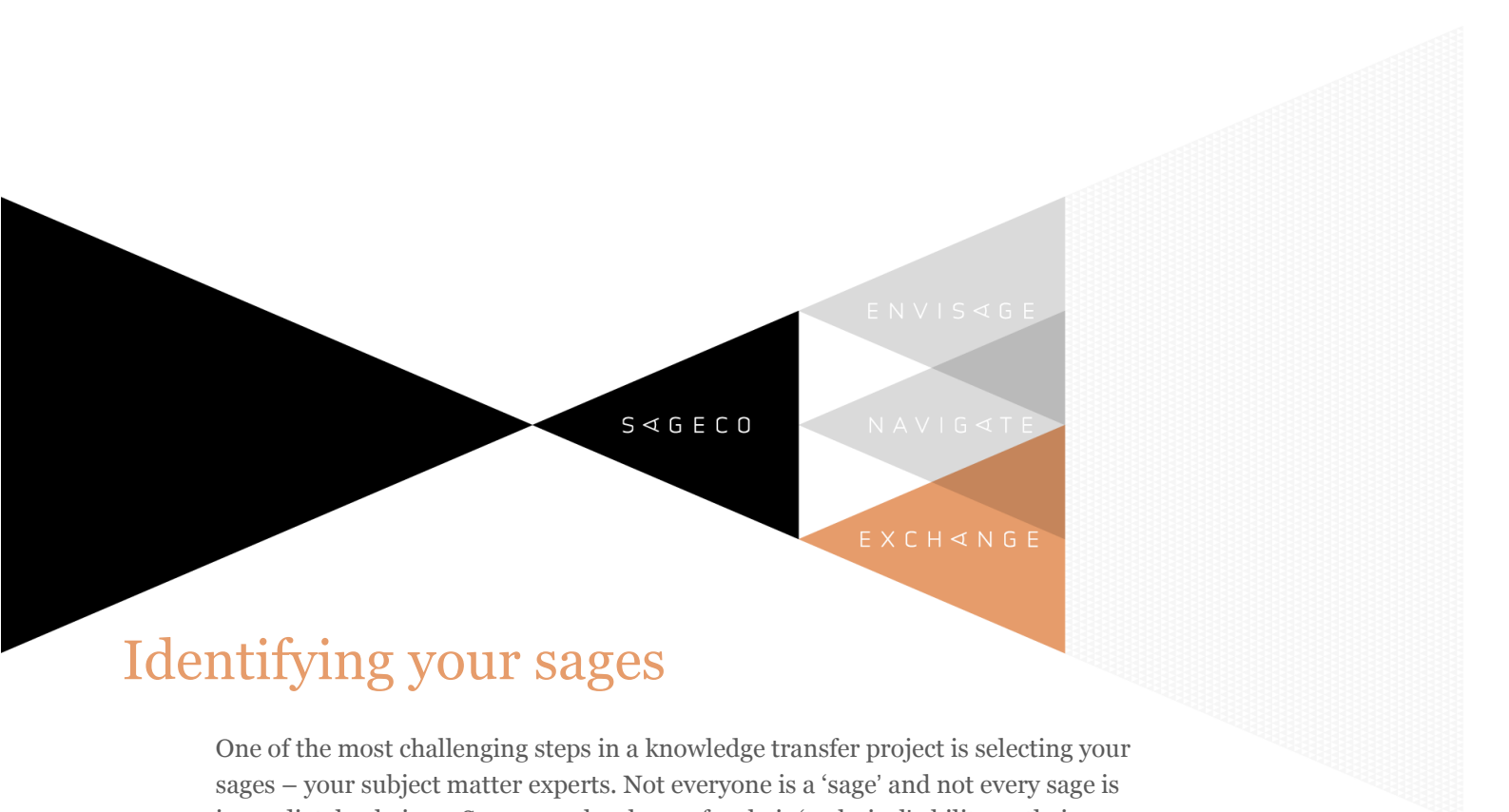




Exchange knowledge between workforce generations

SAGECO



Identifying your sages

One of the most challenging steps in a knowledge transfer project is selecting your sages – your subject matter experts. Not everyone is a ‘sage’ and not every sage is immediately obvious. Sages may be chosen for their ‘technical’ ability or their ‘leadership’ capability or both.

Either way, the aim is to intentionally transfer knowledge between workforce generations in order to:

- Solve problems – current and future
- Innovate – build on what has gone before
- Understand key relationships – internal and external

This document will help you choose ‘sages’ for the full Sageco Exchange™ showcase program or individual knowledge transfer activities; the principles are the same.

The Sageco Exchange™ program is a catalyst for your organisation to build a knowledge sharing culture. Your sages will be the champions of this program. This process gives you an opportunity to identify what knowledge you urgently need to transfer and the best ways to achieve it.

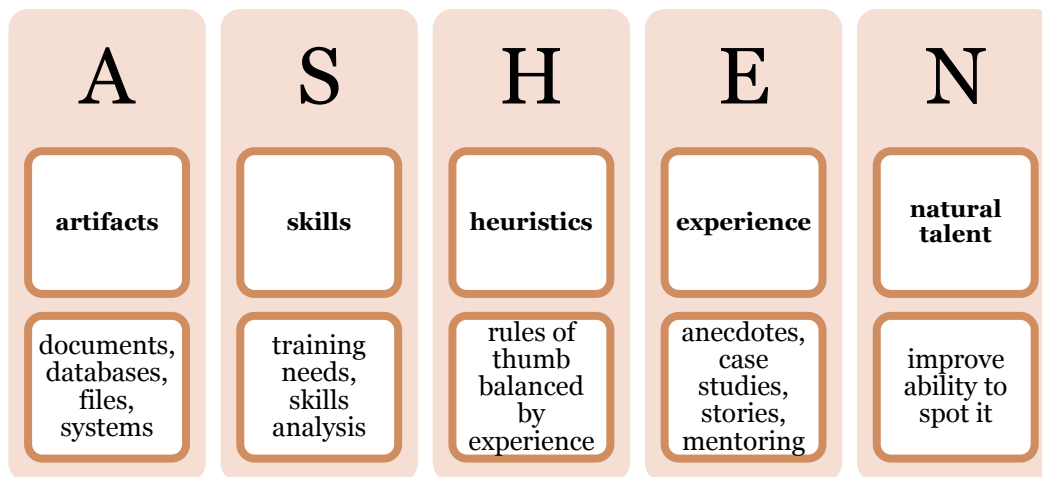
A little knowledge that acts is worth infinitely more than much knowledge that is idle.

KAHLIL GIBRAN

What do we mean by knowledge?

The ASHEN model is a framework developed by Dave Snowden* to guide our thinking about knowledge. Knowledge is not just information – but a combination of the following perspectives.





*Cognitive Edge, www.cognitive-edge.com

Each Sage will have their own version of the above to share with others.

Guiding principles

Having worked with hundreds of ‘sages’ we have developed some rules of thumb which may be useful:

- There is no right or wrong. Just as knowledge is **fluid**, the list you come up with will be fluid. The list is a place to begin.
- If there’s circular debate about who should or shouldn’t be in the program – **include** them. Use the Explore phase of the project to determine the extent of their involvement.
- Deal with the **urgent** cases. The time horizon of people retiring is important.
- Sageco Exchange TM is a **catalyst** and cultural change program. Choose the people that will most likely make it successful. Success breeds success.

Identifying your sages

- Be prepared to **be surprised** by the Explore phase. You don’t really know what people need to know until you ask them.
- Sages may be initially reticent. It is a gradual process of **engagement** and all we need in the first instance is for them to turn up.
- Be careful of **disenfranchising** those who are not elected for the program. Involve them in other ways eg Envisage seminars, surveys

Getting started

1. Using existing data

Relevant data may already exist in your organisation including structures or frameworks such as:

- **Workforce planning data** – How many employees are aged 50-54 or 55+? Where are they located?



- **Critical resource analysis** – What key roles in your organisation are the hardest to recruit for? Now? In the future?
- **Talent management and succession planning** – What reports or analysis exists that I can use for selecting Sages?
- **Risk management** – What are the critical risks for our organisation? Who in these age bands currently mitigates these risks?
- **Strategic Plan / Business Plan** – What are the key activities your organisation needs to achieve in the next 5 – 10 years? Whose knowledge is essential to ensure that you achieve those activities?

These types of frameworks will help inform and focus the Sage selection.

2. Using intuition

- Make a list of who you ‘think’ may be a Sage.
- Have conversations with people about who they rely on most in the organisation? Ask them: “Whose departure would make us most vulnerable and why?”
- Who are our mature employees who are most admired for their:
 - Technical ability?
 - Leadership ability?

3. Addressing workforce resourcing issues

- By focussing on mature employees in critical resourcing areas you can not only transfer critical knowledge but also transfer future roles and job descriptions.
- The Sageco Exchange™ process will:
- Address some of the problems which might be contributing to the resourcing challenges *eg lack of documentation, systems, skill transfer*
- Find innovative solutions to the resourcing challenges *eg role redesign, extending the working life of some of the sages, mentoring relationships for induction and mid-career employees*
- Build greater understanding of resourcing and knowledge requirements *eg contribute to training modules, identifying high value skills and experience required for certain roles*

Sage selection criteria

Once you have a list of names use the following seven criteria to guide your choices. This will help to consolidate your list.

Seven qualities

- This is not an exhaustive list of qualities, but we have found them to be consistently present in all Exchange projects.
- You may wish to add others that are important to your organisation

Using the rating

- The rating system is a highly simplified approach to what is inherently complex.



- We only suggest using it as a means of determining where to start rather than a means of who has sage like qualities and who doesn't
- In the scoring sheet we have weighted each quality equally (5 points each). You may choose to weight the qualities according to your objectives for the project *eg if your focus is on technical expertise then allow column 2 more points and another one less.*

1. Degree of risk	<ul style="list-style-type: none"> • If this person left tomorrow without notice, what core functions, processes, projects and relationships would be at risk?
2. Subject expertise	<ul style="list-style-type: none"> • Does this person hold expertise in a specific area that others value? • Is this subject critical to strategy, procedures, process etc? • Is there existing demand for this person's knowledge ie a go to person?
3. Ease of succession	<ul style="list-style-type: none"> • How easy is this person to replace like for like? • Is this person the only person to have this expertise? Does anyone also know what they know? • What's required to build this capability in the organisation?
4. Championing knowledge transfer	<ul style="list-style-type: none"> • Is this person already recognised for their generosity in sharing information? • Are they a natural mentor or teacher or networker? • Are they respected by others in the organisation? • Will they champion the transferring of knowledge in the organisation? • Will they help to build a knowledge transitioning culture?
5. Organisational perspective	<ul style="list-style-type: none"> • Do people frequently go to this person with questions – even questions that don't relate to their field of expertise? • Is this person a walking database of organisational history?
6. Opportunity for extending working life	<ul style="list-style-type: none"> • How soon is this person intending to retire? • Is this someone you would like to retain beyond the traditional retirement date? • How long do they want to keep contributing to the organisation? • Is there potential for this person to take an on-going role as a mentor / coach / internal consultant beyond the traditional retirement date? • Is there an opportunity to apply flexible working options in a phased retirement program?
7. Degree of influence	<ul style="list-style-type: none"> • Could they successfully attract existing employees to their field of expertise?



Next steps

Once you have identified the sages, you will need to set up a session to provide an orientation to the knowledge transfer activities or Exchange program.

Identifying your sages

Use the scale to assess your knowledge vulnerability. 1= low on 5 = high on scale

Sage's name	Criteria							Technical sage or Leadership sage or both		
	1 = low level of vulnerability 5 = high level of vulnerability									
	Degree of risk	Subject expertise	Ease of succession	Knowledge transfer champion	Organisation perspective	Extending working life?	Degree of influence	Total / 35	Technical	Leadership

For further information about the Sageco Exchange™ program, please contact Sageco via our website – www.sageco.com.au.

