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## Knowledge management and the retirement workforce in theme parks

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Pepperdine University  
Graduate School of Education and Psychology

KNOWLEDGE MANAGEMENT AND THE RETIREMENT WORKFORCE  
IN THEME PARKS

A dissertation submitted in partial fulfillment  
of the requirements for the degree of  
Doctor of Education in Organizational Leadership

by

Carim Castro

April, 2013

Mark Allen, Ph.D. – Dissertation Chairperson

This dissertation, written by

Carim Castro

under the guidance of a Faculty Committee and approved by its members, has been submitted to and accepted by the Graduate Faculty in partial fulfillment of the requirements for the degree of

DOCTOR OF EDUCATION

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## DEDICATION

I dedicate this dissertation to my daughter, Jade. Thank you for the happiness and purpose you bring to my life each day. May you also be motivated to achieve your dreams.



## ACKNOWLEDGEMENTS

To my dissertation chair, Dr. Mark Allen, thank you for your support, patience and guidance through the dissertation process. You made a challenging process attainable, rewarding and fun. Thank you for sharing your wisdom and knowledge with me and for your sincere interest in my research topic. I thank you for joining me on this incredible and unforgettable journey.

To my dissertation committee, Dr. Kent Rhodes and Dr. Karin Kricorian, thank you for your encouragement and valuable insights as I took a proposal and turned it into a completed research study. The excitement you shared with me during each milestone gave me the confidence and motivation to keep going.

To all the theme park retirees and colleagues who participated in this study, thank you for making this research study possible. I sincerely appreciate the time you each took to share your experiences with me. Thank you for your contributions to my professional and intellectual growth.

## VITA

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## ABSTRACT

Companies are seeing valuable knowledge leave the organization as older workers eventually retire taking with them all their knowledge gained, however few companies have begun to focus on knowledge transfer from older to younger workers. Due to the economic downturn, many Baby Boomers are remaining in the workforce longer than planned. Therefore, the time is critical for organizations to act now.

The purpose of this study was to understand what theme parks can do to leverage the knowledge base of its retirement workforce before they leave the company, which factors prevent or influence this knowledge transfer and the role of Human Resources in enabling a knowledge sharing organization. A series of face-to-face interviews with individuals who have retired from the theme park industry and human resources professionals in theme parks were conducted. Several themes surfaced as a result of this study and very little differences were found amongst the participant groups, whether they were a retiree or from HR.

The results of the data revealed that there are none to minimal efforts in place in theme parks to leverage the knowledge base of the retirement workforce. The results also showed that there is a strong desire by those retiring to share their knowledge with the company and in most cases, there is an expectation that this transfer of knowledge take place. However, the lack of interest and engagement by the manager often results in a disappointed retiree and the perception of not being valued.

The study also revealed that HR could play a key role in enabling a knowledge sharing organization. However, for knowledge transfer to take place, HR must first change the culture and prepare the organization to embrace the retirement process and

accept it as a critical and important phase in an employee's career. The results showed that HR could have a key role not just in the transfer of knowledge, but also in the entire retirement process as a whole.

## Chapter 1

### Introduction

In today's challenging global economy, an organization's competitive advantage depends more than ever on their ability to leverage the knowledge base of its employees. With less resources available, yet new technological advances that lead to a competitive edge, organizations must continue to increase their agility and ability to produce more efficient and innovative products and services. The key to surviving in this fast paced and competitive world lives in the heads of the employees.

Since the most recent recession, which began in December of 2007, the number of long-term unemployed workers has increased sharply. In November of 2010, according to the U.S. Bureau of Labor Statistics, the unemployment rate of the United States hit an unprecedented high at 9.8% as many companies reduced their labor force while restructuring lines of businesses to address organizational imbalances. During these workforce reductions many companies saw people take with them much of the organization's knowledge as well as the individual's tacit and explicit knowledge that was developed throughout their tenure with the company and throughout their professional and personal lives. So why have organizations allowed all this knowledge to walk away? What is preventing organizations from transferring and leveraging all the knowledge that is stored in the heads of their employees?

Organizations must take deliberate action in order to effectively tap into this knowledge and understand the impact of knowledge loss at the individual, group and organizational level. The costs can be tremendous when the impacts of lost knowledge are unanticipated. Unfortunately there are barriers that may undermine an organization's

efforts to improve knowledge retention, therefore organizations must understand these barriers and take action against them. Some of these barriers include:

- Lost knowledge costs are usually hidden- cuts, like early retirements, have often been made without a serious consideration of how things are going to run with fewer people. Organizations that are better positioned to address the challenges of retaining knowledge from an aging workforce seem to have senior executives who intuitively recognize the problem and are willing to invest resources in addressing it.
- Uncertainty about where the organization is most vulnerable to lost knowledge- a more strategic approach to workforce planning can help firms identify these risks to see where the organization is most vulnerable to the loss of specialized expertise.
- No clear ownership of the problem- who owns knowledge management and retention? IT and HR may share some of the responsibilities, but it is middle management who deals with the challenges of transferring knowledge and they are not interested in this responsibility.
- No slack left for knowledge-sharing activities- some organizations will not invest time or money for mentoring relationships or any type of knowledge sharing initiatives, as these may be perceived as not being valued added.
- Capturing knowledge is not enough- transferring knowledge is not enough unless those acquiring it have the ability to learn from others and make better decisions (DeLong, 2004).

Understanding what strategic threats could be posed by lost knowledge is an

essential step before pursuing knowledge retention and knowledge management initiatives so that solutions to these can be incorporated into the knowledge management efforts.

## **Background**

There are some companies that are taking the lead at leveraging the knowledge of their new employees. Northrop Grumman Marine Systems is one of them. They have adopted a model to transfer the knowledge new employees bring to the organization with them. Each of the new employees is asked to create a ten-minute presentation that discusses an idea, tool, technique or concept that is not currently used in the organization and would improve the organization's output. During this presentation managers ask questions to gain a deeper understanding of this new idea or perspective (Hyde, 2009).

Another company, World Bank Group's International Finance Corporation (IFC), through their program, SmartLessons, teach their employees how to transfer information through human stories that people can connect with. They have found that storytelling has dramatically increased IFC employee's ability to absorb information and 80 percent of their employees who read SmartLessons find them relevant and it has become an integral part of the process when starting new projects or seeking thought partners (Morris & Oldroyd, 2009).

Companies are also seeing valuable knowledge leave the organization as older workers eventually retire taking with them all their knowledge gained. According to the Society for Human Resource Management (SHRM, 2006) few companies have begun to focus on knowledge transfer from older to younger workers. However, due to the

economic downturn, many Baby Boomers will remain in the workforce longer than planned. Therefore, the time is critical for organizations to act now. In order for organizations to remain competitive, organizations must learn a way to leverage their biggest asset, their people.

Roger Parish, founder and president of Spectrum Consulting Group in Beaverton, Oregon, compares the “*undocumented knowledge*” (p.1) that escapes many organizations when employees leave to warm air escaping from a poorly ventilated building during winter. He said, “Think of the air as the turnover of people through that organization. The heat exchange is the retention of knowledge. People leaving move knowledge across to people coming in” (p.1). This is especially important as baby boomers retire. Parish defines undocumented knowledge as the institutional knowledge not written down anywhere. He calls it strategic knowledge across multiple domains because this knowledge cannot be transferred through training classes, he says it must be transferred through mentors and talent pools, not traditional learning environments (Overman, 2008).

### **Problem Statement**

A study, conducted by the Gallup Organization (2007), asked 1.7 million employees in 101 companies from 63 countries whether or not they have the opportunity to do what they do best at work, shockingly only 20% said that they have this opportunity. So why do organizations fail to leverage the knowledge base and talents of their employees and allow them to do what they do best? The results of the study revealed another shocking result, the longer an employee stays with an organization and the higher he/she climbs the traditional career ladder, the less likely they are to strongly agree that they are playing to their strengths. It is alarming to learn that organizations



operate at 20% capacity. Companies hire people based on their previous job experiences and knowledge. During the recruitment process the focus is on what the potential candidate knows and what experiences he or she will bring to the new organization, but once hired, companies spend thousands of dollars in training programs to help the new employees assimilate to the new organization and learn their way of doing things. Very little to no effort is put in place to understand and tap into the knowledge the individual brings to the organization and the personal and professional experiences that made that person the top candidate for the job.

Companies are also seeing valuable knowledge leave the organization as older workers eventually retire taking with them all their knowledge gained. Another concern is that as our older workforce retires, some companies may not be able to bring new products to market as quickly. The workforce is losing some key senior professionals, such as engineers and other professions that require years of training faster than young engineers are joining in. DeLong (2004), author of *Lost Knowledge* said at a conference “Innovation and new growth, including global opportunities, will be stunned. You don’t start up new locations in Asia with junior people” (p.26).

An industry that is seeing this loss of valuable knowledge as older employees retire is theme parks. Having been part of the theme park industry for 20 years, I have witnessed the gaps left when valuable knowledge walks away and experienced the chaos that arises as the remaining employees struggle to close these gaps, especially for the roles that are unique and held by a few. As theme parks continue to become more global and are operating in countries outside of the United States, it is the most senior professionals that are being tapped and sent overseas to help open these theme parks.

So, what can theme parks do to help transfer the knowledge from their most senior workers to younger ones?

Other factors that make it necessary for theme parks to have knowledge management practices in place include the diversity of functions and roles required to run a theme park as well as their high turnover rates. As many as 3,000 different roles are required to run the Walt Disney World Resort in Florida and the turnover rate within the theme park industry is as high as 50%. These facts create an even greater need to have knowledge management practices in place to be able to leverage the knowledge of its employees, especially of those who have mastered their roles and are ready for retirement. Theme parks continue to face the same operational challenges from decades ago, that of managing, developing and retaining their staff to deliver quality customer service along with the development of strategies and offerings that will result in increased visits by their guests. Nothing guarantees success, but research shows that successful theme parks are those that are effectively managed and those that are able to leverage their staff to respond to changes in the business environment, technological advances, the economy and consumer tastes and behaviors (Anton-Clavé, 2007).

According to the Society for Human Resource Management (SHRM, 2006) few companies have begun to focus on knowledge transfer from older to younger workers. However, due to the economic downturn, many Baby Boomers will remain in the workforce longer than planned. Therefore, the time is critical for theme parks to act now.

### **Purpose of Study**

The purpose of this study was to explore and understand to what extent the knowledge base of employees is leveraged in theme parks and explore the factors that

prevent or promote this transfer of knowledge. This study looked specifically at the retirement workforce in theme parks as they represent a large group of employees who walk away with much of the company's knowledge. This study also looked at the role of Human Resources (HR) and explored the ways in which HR can help organizations leverage the knowledge base of its workers.

The results of this study give theme parks insights into resources and processes that can help them continue to grow and compete in today's challenging economy. Their ability to grow and compete will increasingly depend on their ability to access and utilize the knowledge that is stored in the heads of their employees, especially those who are close to retirement.

### **Research Questions**

In seeking to understand the factors that impact an organization's ability to leverage the knowledge base of its employees, this paper narrowed this focus to the entertainment industry, more specifically, a theme park environment, where creativity and innovation drive their success. This study focused on the untapped knowledge of the retirement workforce, the barriers to knowledge transfer before the retiree leaves the company and the role of Human Resources in helping the organization tap into this knowledge.

This study focused on the following research questions:

- To what extent, based on the perception of those who have retired, does a theme park leverage the knowledge base of its employees before they leave the company?
- What are the perceived factors that impact or influence this transfer and

applicability of knowledge?

- What can the Human Resources Department do to assist a theme park to better leverage the knowledge base of its retirement workforce?

### **Significance of the Study**

The significance of this study is to provide theme parks with the means to grow and compete in today's challenging economy. Their ability to grow and compete will increasingly depend on their ability to access and utilize the knowledge that is stored in the heads of their employees. The keys to their kingdom lie in their most valuable assets, their people.

This study is also significant for the HR profession. HR has a responsibility for helping organizations acquire the right talent, place people in the right roles and in fostering organizations that empower people to use their knowledge and abilities to produce products and services that will help improve the bottom line. HR as a strategic partner can contribute to the bottom line. This study focuses on exploring and understanding the ways in which HR can play a key role in helping organizations leverage the knowledge base of its retirement workforce so that this knowledge can be leveraged to produce the best products and services.

### **Definitions**

Some of the key words in this study are defined as follows:

- Common Knowledge- the knowledge that employees learn from doing the organization's tasks (Dixon, 2000).
- Culture- a set of basic tacit assumptions about how the world is and ought to be that a group of people share and that determines their perceptions,

thoughts, feelings, and, to some degree, their overt behavior (Schein, 2004).

- Data- symbolic representation of numbers, letters, facts or magnitudes and is the means through which information and knowledge is stored and transferred (Ahmed, Lim, & Loh, 2002).
- Explicit knowledge- the typically visible, definable and objective type of knowledge usually found in company documents, files, training, policies, procedures, etc. (Newell, Robertson, & Scarbrough, 2002).
- Human Resources- a discipline that has evolved from being more transactional to more strategic. The HR discipline fosters self-organization, creativity, systems thinking and teamwork and is well positioned to help organizations become a learning culture (Preskill & Torres, 1999).
- Information- data arranged in meaningful patterns (Ahmed, Lim & Loh, 2002)
- Intellectual Capital- the collective brain power of organization members- it is knowledge, information, intellectual property and experience (Stewart, 1997).
- Knowledge- the facts and lessons learned (Buckingham & Clifton, 2001); also the combination of an individual's experience, skills, intuition, ideas, judgments, context, motivations and interpretations (Ahmed, Lim, & Loh, 2002).
- Knowledge Creation- the process in which new explicit or implicit knowledge is developed by groups or individuals; knowledge that does not already exist in the company (McElroy, 2003).
- Knowledge Management- the process of creating, acquiring, sharing, and managing knowledge to augment individual and organizational performance

(SHRM, 2009).

- Knowledge Transfer- the leveraging of existing knowledge in groups, teams, divisions and business units, in order to generate value for the company (Beerli, 2003).
- Learning- the process that results in a change in knowledge- i.e. a change in our beliefs about causal relationships in the world and our organization (Sanchez, 2001).
- Learning Communities- organization members who pursue issues of common interest and practice. They seek consensus in decision-making processes. They are empowered to act. They rely on one another for information and learning. See themselves as part of a larger whole, more than the sum of their individual relationships (Preskill & Torres, 1999).
- Organizational Knowledge- a shared set of beliefs about causal relationships that enable individuals in an organization to work together in doing something (Sanchez, 2001).
- Organizational Learning- people thinking differently and working differently together; thinking differently in terms of being aware of their own thought processes and how they react to situations and how they fit in a broader context. The organization as a whole taking knowledge and expertise and information and lessons learned in one place, and constantly ensuring the wheel is not recreated (Preskill & Torres, 1999).
- Retirement workforce- also called *baby boomers* are individuals who were born in the years from 1946 through 1964. This group of employees is rapidly

approaching retirement, while holding 19 % of the management positions within organizations and that number appears to be gaining strength (Succession Planning, 2005).

- Tacit knowledge- knowledge that lives within individuals and their behaviors. Tacit knowledge is context-rich, often subjective and not easily transferrable. Tacit knowledge is the shared learning and collective wisdom of an organization, such as how things are done and organizational experiences (Newell, Robertson, & Scarbrough, 2002).
- Theme Parks- the organization where the study takes place. This organization provides entertainment through various offerings including thrill ride attractions, shows and parades, restaurants and merchandise and various opportunities to interact with characters and create unique and unforgettable experiences. Theme parks are a harmonious spectacle that can be seen, heard, and lived in a different way from how life is lived conventionally (Anton-Clavé, 2007).

### **Key Assumptions**

There are a couple of assumptions that applied to the study. The first one is that the appropriate questions were asked to solicit the data collected. The second one is that during the interactive process between the researcher and the participants, the participants provided valid data or in other words, they were truthful. The third assumption is that the researcher's corporate experiences helped to provide insight into the participant's experiences within the industry. It is assumed that the researcher was able to put aside all biases and interpret the data fairly and without prejudice (Creswell & Miller, 2000).

## **Limitations of the Study**

There was the possibility of bias in both the participants and the researcher due to the close association with the subject matter and the population. Another limitation was that the data collected would only apply to the theme parks being studied and the results would not be descriptive of other theme parks nor the entertainment industry as a whole. Also, the use of verbal interviews as the primary source of raw data may have limited the extensiveness of the responses by the participants (Creswell & Miller, 2000). The viewpoints of the participants may have been overly biased or reflective, consequently diminishing the possibility of common themes.

## **Summary**

Companies are seeing valuable knowledge leave the organization as older workers eventually retire taking with them all their knowledge gained. According to the Society for Human Resource Management (SHRM, 2006) few companies have begun to focus on knowledge transfer from older to younger workers. However, due to the economic downturn, many Baby Boomers will remain in the workforce longer than planned. Therefore, the time is critical for organizations to act now.

Organizations seem not to be aware that the costs can be tremendous when the impacts of lost knowledge are unanticipated. Unfortunately there are barriers that may undermine an organization's efforts to improve knowledge retention, therefore organizations must understand these barriers and take action against them. Some of these barriers include:

- Lost knowledge costs are usually hidden- cuts, like early retirements, have often been made without a serious consideration of how things are going to



run with fewer people. Organizations that are better positioned to address the challenges of retaining knowledge from an aging workforce seem to have senior executives who intuitively recognize the problem and are willing to invest resources in addressing it.

- No clear ownership of the problem- who owns knowledge management and retention? IT and HR may share some of the responsibilities, but it is middle management who deals with the challenges of transferring knowledge and they are not interested in this responsibility.
- Capturing knowledge is not enough- transferring knowledge is not enough unless those acquiring it have the ability to learn from others and make better decisions (DeLong, 2004).

This study focused on understanding to what extent the knowledge base of those close to retirement in theme parks is leveraged for the benefit of the company and explored the factors that prevent and/or promote this transfer of knowledge. This study also looked at the role of Human Resources (HR) and explored the ways in which HR can help organizations leverage the knowledge base of its workers.

The results of this study give theme parks insights into resources and processes that can help them compete in today's challenging economy. Their ability to grow and compete will increasingly depend on their ability to access and utilize the knowledge that is stored in the heads of their employees, especially those who are close to retirement. Why let them walk away with so much of the company's knowledge? Now is the time for organizations to take action and prevent this knowledge from walking out the door.

## Chapter 2: Literature Review

To compete in the twenty-first century, organizations must find a way to transform themselves from physical asset rich to intangible asset rich. This literature review on knowledge management demonstrates that it is the quality of human capital, in terms of creativity, insight, entrepreneurship and innovation that is the source of an organization's competitive advantage. *Heavy lifting is out; brains are in* (Davidson, 2002).

This literature review provides a background on knowledge management as a discipline, and expands on the definition on knowledge and the different types of knowledge. This literature review also explores different knowledge management strategies, what has worked and not worked as organizations implement ways to leverage the knowledge of their workers. In this chapter I discuss the aging workforce and what companies are doing to retain this workforce and help transfer their knowledge to younger generations. This chapter ends with a literature review and discussion on the role of Human Resources (HR) in helping organizations shift to knowledge sharing organizations and the potential HR has to serve as a strategic partner that contributes to the overall success of a company.

In my research, I found a lack of literature on knowledge management that is specific to how it is utilized and leveraged in theme parks. However, the literature that exists on the role of HR in implementing and preparing organizations to leverage knowledge management strategies is applicable to all organizations, including theme parks. HR plays a key role in the successful implementation of knowledge management systems, as knowledge management is far more about how organizations manage their

staff than it is about how they capture information using technology.

Before discussing knowledge management as a discipline and how its practices can help organizations compete in today’s challenging environment, it is important to understand the role of theme parks in our society, what makes these organizations unique, and the successes and challenges that impact and drive their business.

**Introduction to Theme Parks**

According to the Association of Amusement Parks and Attractions (IAAPA, 2010), in the United States alone, more than 335 million people visit theme parks every year, generating more than \$11.5 billion. The fact that people gather in large numbers to be entertained or enjoy a spectacle has not changed across time and space.

Theme parks today are a contemporary manifestation of the old fairs and carnivals that people have enjoyed since the 1,500s. The table below shows the social evolution of these recreational places that have evolved from fairs to amusement parks to theme parks:

Table 1

*Social Evolution of Recreational Places*

Social Characteristics	Pre-modern	Modern	Late-modern
Dominant place	Rural	Town	City
Production base	Agrarian	Industrial	Service/symbolic
Orchestration	Church/monarchy	Company/state	Corporation/media
State formation	Colonial	Nation	Transnational
Bridging voice	Tradition/church	Reformer/sponsor	Advertiser
Relations	Communal	Impersonal	Corporation with face

(continued)

Social Characteristics	Pre-modern	Modern	Late-modern
Identity	Birth/craft	Production	Consumption/Pleasure
Market	Local	National	Global
Communication	Oral	Mass-mediated	Promotional Culture
Group	Family/guild	Class	Fragment/other
Self	Animistic	Individual	Cultural subject
Power	Force	Alienation	Hegemony
Chronology	1500-1850	1850-1960	As of 1960

*Note.* Botterill, 1997 (as cited in Anton- Clavé, 2007)

In the United States, amusement parks became most popular during the first decade of the 20<sup>th</sup> century, with Coney Island, giving the working class New Yorkers a paradise to escape from the realities of the world and a place to enjoy themselves through its roller coasters, foods and drinks. This was an introduction of an amusement park as a place where you could entertain all your senses through technology and illusion. This popularity of amusement parks declined between 1930 and 1950 due to the impacts of World War II, poor management and the reputation of these parks as being dirty and unsafe. It was in the 1950s that amusement parks evolved to theme parks with Disney capitalizing on America's fascination with film and television by incorporating them into the marketing and design of his parks. Theme parks became the place where people could experience, like in cinematography, a different reality and fantasies through its scenes, sets and multidimensional nature. This was Disney's greatest contribution to the leisure industry, the means of transforming the cinema into a fair format, through the circulation

of stories, first through cinema and television, then bringing these stories to reality in the parks. This shift to theme parks stimulated consumption of products and services, by disguising these as elements naturally integrated in the environment (Anton-Clavé, 2007).

The factor that makes theme parks unique is the ability to control the sale of goods and experiences through the use of a theme or story that causes emotional responses from the consumers. Theme parks, as a place of leisure and entertainment, also have a huge influence and lead the way in the usage of space. Theme parks are seen as places of innovation concerning planning matters regarding the use of land, design and construction, the management of energy flow, transport and communication. However, a park's success depends on the work performed by its people. The main areas of management are operations, personnel and marketing, all fundamental in maximizing the experiences of the visitors to the park. Service activities comprise a significant component for theme parks, both in the satisfaction they provide to their customers and in their role in generating revenue. Walt Disney once said, "you can design and create, and build the most wonderful place in the world, but it takes people to make the dream a reality" (Smith, 2001, p. 77). Nothing guarantees success, but research shows that the chances of running a successful theme park are greatly enhanced if it is effectively managed. The goals of the theme park as a business remain the same. That is, to increase the number of visits, return visits and finding new ways to promote the parks to corporate clients. The main challenges operators face today have to do with the management of their staff, the ability to provide quality, customer satisfaction and the need for the new, competitive advantage strategies (Anton-Clavé, 2007).

HR plays a key role in helping address these challenges as well as in addressing

the following personnel challenges (Anton-Clavé, 2007):

- The large number of seasonal and part-time jobs
- High percentage of employees with no formal education beyond high school
- The need to perform monotonous operational functions, crucial from a service standpoint
- A high number of roles that provide service to its visitors, so the need to hire people who enjoy interacting with others and providing high levels of service
- The diversity of professional functions and roles
- High turnover rates, as high as 50% in some areas
- The few number of great theme parks, making it difficult to attract talent if opportunities for career advancement are not visible (Anton-Clavé, 2007)

As mentioned above, the success of the theme parks weigh heavily on the ability of its people to deliver and exceed the expectations of its visitors. One way managers can help their staff is by providing them with tools to handle difficult situations as well as the many questions and challenges that one can face when dealing with thousands of people on a daily basis. Through mentoring and role-playing, managers can help their staff to have a genuine interaction with their guests and enhance the guest experience. The role of the manager as a mentor is crucial to develop employees that will know how to most effectively manage their interactions with their guests, think creatively, and communicate effectively so that problems are solved and guests are happy (Helmer, 2011).

The literature review on knowledge management that follows will demonstrate other strategies and best practices that can be leveraged by theme parks managers to address the operational challenges faced today.

## **Introduction to Knowledge Management**

Knowledge Management is a discipline that emerged in the mid-1990s and remains strong. The goal of this discipline is to address today's need to leverage some mix of business processes, people, and technology to create a competitive advantage (Koenig & Srikantaiah, 2004).

The definition of knowledge management continues to evolve. It started simply as being valuable information in action, with value being determined by the organization and the recipient to a discipline expected to show a return on investment. For some organizations knowledge management is about fostering the creation of a learning organization. Others want to reduce operational redundancy by improving communication and collaboration. Still others may want to improve data and information collection so that all departments are working from the same page (Wilson, Barnfield, & Leheny, 2002).

The American Productivity and Quality Center (APQC) defines knowledge management as an emerging set of strategies and approaches to create, safeguard, and put to use a wide range of knowledge assets, such as people and information. Thus, these assets flow to the right people at the right time so that they can be applied to create more value to the organization (Koenig & Srikantaiah, 2004).

This definition has some critical success factors built into it. It implies that there is a definite structure or a way to do things and that the information is not being managed for the sake of managing the information, but rather to make sure that it flows to the right person and at the right time. This definition also states the purpose, which is to add value to the organization. If the way the information is captured is not value-added to the

organization, then it is not knowledge management.

Robert Buckman, CEO and Chairman of Buckman Laboratories, an early leader in knowledge management, believed that the power of his organization was housed in the individual minds of his workers. He called this *the unconscious knowledge of his organization*. He believed that by connecting these individual knowledge bases together, they would be able to do whatever they do best in the shortest possible time. He also believed that by giving everybody complete access to information about the company he wouldn't have to tell them what to do all the time. His goal was to connect people through a network that would capture the collective experience of his employees worldwide while eliminating time and space constraints in communication and fostering an environment that valued knowledge sharing and individual contributions to their service oriented team. This network allowed workers to ask questions or ask for help from all employees, thus maximizing and leveraging the knowledge base of all employees (Fulmer, 2003).

One of Buckman's first strategies, that helped him carry out his vision, was the creation of a knowledge transfer department (KTD). His mission and goals for this knowledge transfer department were very clear and communicated the benefits his employees would see if they used the resources provided by this department. These included:

KTD's Mission: Plan, organize and manage information system applications, infrastructure, and associated resources necessary to rapidly disseminate collective industry, technical and market knowledge in order to gain a sustainable, global, competitive advantage by proactively responding to the information and



knowledge needs of Buckman Laboratories worldwide.

KTD Goals: (1) Accelerate the accumulation and dissemination of knowledge by all Buckman Laboratories Associates worldwide. (2) Provide easy and rapid access to Buckman Laboratories' global knowledge base. (3) Eliminate time and space constraints in communications. (4) Stimulate associates to experience the value of enterprise knowledge sharing in servicing our customers; and (5) Respect the dignity of each individual by cultivating an environment which enhances their professional development, and recognizing each as a valued member of a service oriented team. (Fulmer, 2003, p. 13)

Buckman Laboratory was successful because they had a strategy that kept evolving as they identified obstacles and desired needs. Once the employees were comfortable networking and communicating across the globe they focused on expanding the knowledge of their employees by providing personal and professional developmental and training opportunities via a Learning Center. Buckman's strategies eventually became popular and admired and learned by other companies. He believed that in order to be successful he had to change the culture of the organization to one that desired collaboration and learning. He described his journey as follows:

You need to change the way you relate to one another. If you can't do that, you won't succeed. It has to do with the fuzzy-wuzzy stuff that's not easy to get your hands on. But it boils down to this: Do you trust the people who give you the information? The first year they think you are crazy. The second year they start to see, and the third year you get buy-in. What you need is persistence. This whole thing is a journey- a journey without end and it has invaded the fabric of our

corporation. This is not a project, with a clearly defined, finite goal, with a beginning and an end. We just kept adding stuff that worked and eliminated things that didn't. It was a continual cut-and-try process, an evolutionary process. (Fulmer, 2003, p. 11)

His success is attributed to his strategy and vision. When organizations do not have a clear knowledge management strategy and have undirected knowledge management initiatives, it makes matters worse for an organization. "If the knowledge hose is turned on with no one to point it in the right direction, like an undirected garden hose it will spray around everywhere and just dampen everyone's enthusiasm" (Gamble & Blackwell, 2001, p. 120).

The concept of knowledge management has also been associated with the term *organizational learning*, which focuses on the need to blend managerial and worker perspectives into a common mindset. Knowledge management in this concept encourages openness to the larger business community, during which the knowledge of worker's would come into alignment with that of management's (Fuller, 2002).

While there are many definitions for knowledge management, very few mention technology. It is important to mention this because there is a wealth of knowledge management vendors and tools that guarantee that businesses will perform better with their software. Many businesses have relied on high-tech content management systems, a repository and search tools to help manage the sharing or transfer of knowledge in their organizations. Some of these tools alone can be helpful. However, in order for these systems to be value added, they must be part of a bigger strategy for knowledge management and be accompanied by a solid business case and support from senior

leaders (Wilson, Barnfield, & Leheny, 2002).

To understand what knowledge management implies it is necessary to understand what knowledge is. The fundamental mistake that companies make repeatedly is that of equating information and knowledge. Below is a contrast of information and knowledge:

Table 2

*Information vs. Knowledge*

Information	Knowledge
Processed data	Actionable information
Simply gives us the facts	Allows making predictions, causal associations, or predictive decisions
Clear, crisp, structured and simplistic	Muddy, fuzzy, partly unstructured
Easily expressed in written form	Intuitive, difficult to communicate and express in words and illustrations
Obtained by condensing, correcting, contextualizing and calculating data	Lies in connections, conversations between people, experience-based intuition, and people's ability to compare situations, problems and solutions
Devoid of owner dependencies	Depends on the owner
Handled well by information systems	Needs informal channels
Key resource in making sense of large volume data	Key resource in intelligent decision making, forecasting, design, planning, diagnosis, and intuitively judging

*(continued)*

Information	Knowledge
Evolves from data: formalized in databases, books, manuals and documents	Formed in and shared among collective minds; evolves with experience, successes, failures, and learning over time
Formalized, captured, and explicated; can easily be packaged into a reusable form	Often emerges in minds of people through their experiences

*Note.* Tiwana, 2001, p. 37.

By differentiating knowledge from information one can then see knowledge as information combined with experience, context, interpretation, and reflection. It is a high-value form of information that is ready to be applied to decisions and actions. Taking the concept of knowledge one step further, one can differentiate between implicit and explicit knowledge.

### **Implicit and Explicit Knowledge**

Explicit knowledge is that knowledge which has been expressed either verbally or in text form. A recipe book is an example of explicit knowledge since it takes individual's knowledge about how to make something, the particular ingredients and their quantities and the process of combining these to produce the finished product. Explicit knowledge is knowledge that can be shared and others can reproduce. Implicit knowledge, on the other hand, is that knowledge which is very hard to formalize and communicate. Implicit knowledge resides in our heads and in our practical skills and actions; for example, the act of riding a bike (Newell, Robertson, & Scarbrough, 2002).

So with so much information flowing continuously from activity to activity, from person to person, and from task to task, how do you manage the knowledge flow? It is

possible to divide knowledge management into logical phases of evolution through four generic categories of knowledge processes. These categories help management identify knowledge barriers and develop knowledge-enhancing measures. “The four categories are:

1. Localizing and capturing- finding already existing knowledge
2. Sharing and transferring- leveraging existing knowledge
3. Creating- development of new knowledge
4. Applying- the usage of knowledge (Beerli, et al.)

According to Beerli et al. (2003), who focused his studies on networks as the power for knowledge management, the focus of localizing and capturing knowledge lies on finding and charting already existing knowledge in the company. This is a challenge for big companies that have a widely dispersed knowledge base, as some business units may encounter problems that have already been solved in other areas, yet they do not know that, and are forced to reinvent the wheel.

Knowledge sharing and transferring refers to the leveraging of existing knowledge in groups, teams, divisions and business units, in order to generate value for the company. Explicit knowledge can often be easily transferred through electronic media or other forms of documents such as manuals and handbooks. But knowledge can also exist in stories, actions, metaphors, analogies, behaviors, or visions. Sharing this implicit knowledge is more difficult, since the direct interaction of the people inside the organization is crucial (Beerli et al., 2003).

The process of knowledge creation has to do with the development of new explicit or implicit knowledge by groups or individuals, not already existing in the

company. New knowledge can be created by expanding on existing explicit or implicit knowledge or through a new method of combining these forms of knowledge. This concept, that knowledge is something that we produce, not that it already exists, is best described by the second generation practitioners of knowledge management. They believe that through individual and shared processes that have regularity to them, knowledge can be produced. This process at the organizational level is referred to as the knowledge life cycle (McElroy, 2003).

According to Beerli et al. (2003), applying knowledge is about the application and usage of the knowledge in actual business situations, such as decision making or problem solving. This aligns with the knowledge life cycle described by McElroy (2003), which begins with the detection of business problems or gaps in processes and ends with newly validated knowledge claim or belief.

### **How Can Organizations Transfer Knowledge?**

An organization's ability to manage their intellectual capital has become a hot topic in today's business environment and something commonly cited as a source of competitive advantage. Many companies have implemented different practices to manage their intellectual capital; some have gone as far as treating knowledge management as a distinct discipline. The following paragraphs capture some of these best practices that have helped organizations manage and leverage their intellectual capital.

The first step in a company's pursuit of knowledge management and transfer is to identify the strategic problem that could be improved if there was a way to manage and leverage the knowledge of the organization. Identifying this gap or need would be the first step in developing the business case or value propositions for knowledge

management. According to O'Dell and Grayson (1998) there are three common value propositions: customer intimacy, product-to-market excellence and operational excellence,

Customer intimacy focuses on capturing and using knowledge that will meet and exceed the needs of the customers and in turn increase customer loyalty and satisfaction and improve the bottom line. Product-to-market excellence has to do with leveraging knowledge in order to improve the time and efficiency in getting products out in the market. Operational excellence is all about creating savings by finding efficiencies in the operation.

The second step a company must take in order to manage and leverage their knowledge is to ensure an environment and culture that supports and encourages knowledge management. It is critical for an organization to have strong leadership that understand the need for knowledge management and that are willing to invest in the right technology, the infrastructure to support this initiative and an organized way of achieving this (O'Dell & Grayson, 1998).

Another best practice is to establish a steering committee to develop the business case for knowledge management and establish the framework that will guide the policies and implementation of knowledge transfer. This committee should design guidelines for each of the five types of transfer as defined by Dixon (2000) in order to find a transfer system that is appropriate for the kind of knowledge and task. If the transfer system does not make sense to the organization it could easily be ignored or abandoned. The five types of transfer that should be considered are:

- Serial transfer- the knowledge a team has learned from doing its task that can

be transferred to the next time that team does the task in a different setting

- Near transfer- the explicit knowledge a team has gained from doing a frequent and repeated task that the organization would like to replicate in other teams that are doing very similar work.
- Far transfer- the tacit knowledge a team has gained from doing a non routine task that the organization would like to make available to other teams that are doing similar work in another part of the organization
- Strategic transfer- the collective knowledge of the organization needed to accomplish a strategic task that occurs infrequently but is of critical importance to the whole organization.
- Expert transfer- the technical knowledge a team needs that is beyond the scope of its own knowledge but can be found in the special expertise of others in the organization (Dixon, 2000).

Organizations that support their knowledge management applications with cultural and structural change initiatives are much more likely to receive high return on investment. Ahmed, Lim, and Loh (2002) identified the following five factors as having a positive effect on people's eagerness to share and learn:

- Core cultural values- the new knowledge management behaviors should be formalized as part of the corporate values or introduced as a distinct set of knowledge management values. Open communication and networking should also be part of the corporate values as these foster an environment of collaboration.
- Recruitment of suitable personnel- Human Resources plays a key role in



ensuring they are recruiting people who want to learn and transfer learning. In addition, there must be the right training and systems in place to ensure knowledge is shared and used as a competitive advantage.

- Role of human networks- it is critical to create formal and informal communities of interest where people can share with each other. These could include professional networking, multi-function and cross-functional teams or having open office layouts that promote informal communication.
- Rewards as a motivational tool- reward structures and performance metrics need to be created which benefit those individuals who contribute to and use a shared knowledge base. These rewards do not have to be monetary, things such as recognition, opportunity to work on challenging tasks, exposure to company leaders are the type of recognition that build company loyalty and employee satisfaction.
- The role of a champion- it is important to select the right person to lead this effort. This person needs to be well respected, have influence skills, credibility. A best practice is to have not an executive, but several *thought leaders* as the champions of knowledge management in the organization.

Because knowledge management is rooted in human experience and social context, managing it well means paying attention to people and the organizational culture. Therefore a successful implementation of knowledge transfer practices must be accompanied by changes to existing individual and organizational behaviors.

Another concept, called wisdom networks, was introduced by Benton and Giovagnoli (2006) to capture and leverage the tacit knowledge and expertise that exists in

people's heads and which companies could leverage to help them deal with critical business issues. In every organization, people possess a great deal of expertise, yet often are only encouraged to apply their knowledge to a narrow range of topics. It is up to the organization to find these hidden experts and engage them in dialogue in order to tap into their knowledge and wisdom. Wisdom networks are those that arise spontaneously or as ad hoc or grassroots efforts. Sometimes wisdom networks begin as a few experts getting together informally, over drinks after work or coffee breaks, and gradually switch from grassroots status to a larger, more business goal-focused group. As this group evolves, so too does its value to the organization. Benton and Giovagnoli provide an eight-step process for identifying, sharing and leveraging the expertise that lives in the heads of their employees:

Step 1: Create an environment conducive to wisdom sharing

Step 2: Use magnet topics to attract the experts

Step 3: Support ad hoc groups and communities that emerge around magnet topics

Step 4: Encourage boundary crossing and role breaking in pursuit of topics of interest

Step 5: Identify the experts who share their expertise consistently and effectively

Step 6: Let it be known that people who shine in groups achieve organizational stardom

Step 7: Provide a variety of implementation options to attract the best and brightest experts

Step 8: Create unconventional measures to evaluate and reward performance and track the networks impact (p. 12).

## **International Perspective on Knowledge Management**

Some companies don't realize the potential rewards of knowledge because they misunderstand it or don't know how to gain control of it. Common symptoms showing that knowledge is managed poorly in an organization include:

1. Knowledge creation, transformation, and use remain unstructured
2. Decisions are often made without the benefit of the best knowledge available in the organization
3. Knowledge is not used or shared, meaning staff either continually reinvent the wheel or duplicate the efforts of others elsewhere in the organization
4. People are overwhelmed with information that detracts from, rather than adds to, their ability to do their job
5. Knowledge hoarding by staff is common, and there is little organizational interest in the value of developing knowledge capacity among staff (Davidson & Voss, 2002, p. 12)

The fact that these symptoms are widespread demonstrate that although there is nothing new about knowledge, recognizing it as a corporate asset continues to be a challenge to many organizations. Knowledge management is about bringing the most useful knowledge you can find to assist in solving the kinds of problems the organization faces on a regular basis and in pre-empting the kinds of problems the organization is likely to confront in the future.

However, because there is so much knowledge and information available that could potentially be useful to any organization, information technologies are seen by some companies as the key to knowledge management. Debates about knowledge

management should not be reduced to arguments about that latest hardware or software offerings. Knowledge management is about organizational learning and about organizational thinking. And of course, organizations or computers do not learn nor think; only the people who work for them can do that (Davidson & Voss, 2002).

According to Japanese organizational theorist, Ikujiro Nanaka (1991), a lot of Western managers hold a too-narrow view of what knowledge is and what companies must do to tap into it. They believe that the only useful knowledge is *hard* data and see the company as a kind of machine for information processing. He believes that the best way to manage knowledge is by tapping the tacit and subjective insights, intuitions and ideals of the employees and making those ideas available for testing and used by the company as a whole. Successful Japanese companies such as Honda, Canon and Sharp have become famous for their ability to respond quickly to customers, create new markets, rapidly develop new products, and dominate emergent technologies. The secret of their success is their unique approach to managing the creation of new knowledge. The key to this process is personal commitment, the employees' sense of identity with the enterprise and its mission. According to Nanaka, mobilizing that commitment and embodying tacit knowledge in actual technologies and products require managers who are as comfortable with images, symbols, metaphors and slogans as they are with hard data, numbers and ROI (Nanaka, 1991).

Nanaka (1991) also states that Japanese companies are like living organisms, having a collective sense of identity and fundamental purpose. This is the organizational equivalent of self-knowledge, a shared understanding of what the company stands for, where it is going, what kind of world it wants to live in, and most important, how to make

that world a reality. In this respect, the knowledge creating company is as much about ideals as it is about ideas, and that fact, fuels innovation. In the knowledge creating company, inventing new knowledge is not a specialized activity or the responsibility of one department; it is a way of behaving, in which everyone in the organization is a knowledge worker (Nanaka, 1991).

“It is often said that those who do not learn from history become doomed to repeat it. In the knowledge management arena the same idea is captured by the expression, hindsight + insight = foresight” (Gamble, & Blackwell, 2001, p. 122). The key points on which a company concentrates its knowledge management efforts must be chosen very carefully. The initial aim is to locate niches that can provide added value very quickly, increasing confidence in the process across the enterprise.

### **Knowledge Management Strategies**

The American Productivity and Quality Centre has identified six broad knowledge management strategies.

1. *Enterprise-wide*. These companies are usually well down the road of being knowledge enabled and usually have a formal knowledge champion at a very high level. A good example of such a company is Buckman Laboratories. In this organization significant resources are dedicated in all areas of the business to ensure continual enhancement and dissemination of the knowledge base through people, processes and products.
2. *Transfer of knowledge and best practice*. The idea is to enable the company to reduce cycle times, increase customer responsiveness, increase sales and cut costs. Such companies underline the importance of teams, relationships and

networks as a basis for effective transfer.

3. *Customer-focused knowledge strategy.* Here the emphasis is on customer relationship management and is directed towards capturing, developing and transferring knowledge about customer motivations and behaviors. Knowledge contributed by customers forms an important part of the knowledge base and directly influences how the organization responds.
4. *Personal responsibility for knowledge.* The responsibility of knowledge management truly lies with the individual employee. This strategy recognizes the personal properties of knowledge as belonging to individuals and groups. The objective is to ensure that all members of the enterprise constantly renew and share their knowledge assets, so that they are capable of performing their work.
5. *Intellectual asset management.* This strategy is about leveraging assets such as patents, operational practices, customer relations and other structural knowledge assets. The focus is on reviewing, organizing, valuing, safekeeping and increasing the availability of these assets.
6. *Innovation and knowledge creation.* The aim here is to emphasize the creation of new knowledge by leveraging existing knowledge (Gamble & Blackwell, 2001).

When functioning in a global economy, companies can no longer expect that the products and services that made them successful in the past will keep them competitive in the future. With the rapid changes and pressures of a global and information based economy, knowledge management has become vital to the organization. Also, the role of

the Chief Knowledge Officer has become more crucial. Major firms such as Coca Cola, Ernst & Young, Johnson & Johnson and PricewaterhouseCooper have come to the forefront of management thinking by appointing Chief Knowledge Officers and implementing knowledge management programs. These positions and initiatives send an important signal to the organization that knowledge is an asset to be managed and shared (Malhotra, 2001).

Most Chief Knowledge Officer positions are created for these reasons:

1. Corporate knowledge capital is neither being explicitly nor effectively managed.
2. Corporate resources are seen as a key to corporate growth and profitability.
3. There is a realization that long-term prosperity depends upon management's ability to leverage the hidden value of corporate knowledge.
4. There is a clear appreciation that people in the organization are ignoring past mistakes, making the same mistake over and over, and wasting time that could be saved by making better use of the collective knowledge that exists in the organization.
5. Having recognized the value of employee empowerment, the organization now realizes that they are not making good use of employee knowledge (Malhotra, 2001).

According to Malhotra (2001), Chief Knowledge Officers should focus on the following:

1. Advocate knowledge and learning from it. Champion changes in organizational cultures and individual behaviors relative to knowledge.

2. Design, implement and oversee a firm's knowledge infrastructure, including its libraries, knowledge bases, human and computer knowledge networks, research centers and knowledge-oriented organizational structure.
3. Manage relationships with external providers of information and knowledge.
4. Provide critical input to the process of knowledge creation and use around the organization.
5. Design and implement the knowledge codification process.
6. Measure and manage the value of knowledge.
7. Manage the organization's professional knowledge managers, giving them a sense of community and establishing professional standards.
8. Lead the development of knowledge strategy, focusing the resources on the types of knowledge it needs most (Malhotra, 2001).

These Chief Knowledge Officers must have a great understanding of the organization and its business drivers, combined with an ability to take a holistic view of the company and to understand the mix of hard and soft skills necessary to create, sustain, and utilize the organization's knowledge base.

Another knowledge management strategy is that there are four processes that an organization must have for the successful implementation of knowledge management practices. The four processes are: generating, organizing, developing, and distributing content.

1. Generating- this is about getting people to want to contribute to share ideas, and about teaching people how to use the tools in place to be able to share their ideas. People need to want to share their knowledge and learn new things



from others in order for this to be successful. Therefore, if you do not have the right cultural mindset, this could cause a problem.

2. Organizing- This is all about knowing what to do with the information shared so that it is easy to use. This is about knowing how to organize the information in a way that it will be easy for others to access it, keep it current and relevant, and adds value.
3. Developing- this step requires subject matter experts to review the data in order to organize the data into knowledge modules so that it is easy for the organization to access it. This step is also about getting people to develop new data in order to maintain the value and relevance of the data captured.
4. Distributing- this is about identifying the process that will make data accessible to everyone in the organization. The goal is to make it easier for the user to find the information they are looking for and also to encourage the use and reuse of knowledge. Having the proper training in place so people know what is expected of them is critical. Also having reward systems in place will help ensure the objectives of the process are met (Garvin, 1997).

### **Tools for Knowledge Management**

Many approaches to knowledge and knowledge management have been developed over the years, however not one tool stands alone. It can only be understood in the context in which it is used and the methodologies that are associated with it. One of the most well developed sets of tools and methodologies are those of the scientific method. Technologies have been applied and tools developed to create knowledge along with methods. However, there are many types of knowledge residing in an organization,

some scientific, some are not. Because of this, organizations should not place too much emphasis on one particular type of knowledge and not rely on just one system or tool.

The most common tool for the generation of knowledge is knowledge sharing or knowledge transfer. It is only through the sharing of knowledge that we become aware of the gaps in our knowledge. There are also tools that can be used to examine and evaluate existing practices and processes that have been part of the organization for a long time that perhaps could benefit from being surfaced. There are also tools for codifying and refining knowledge, such as web-based tools. The Web provides interactive, rich communication between users regardless of their location. Among the most significant applications for the Web are search engines as these continue to serve as knowledge navigators to its users. The Web has also allowed for some collaborative tools, such as share sites, videoconferencing, chat rooms, etc. There are also many databases being used, though many would argue that this is not a knowledge management tool, rather a place to store and analyze data. In order for this data to be meaningful it must interact with their users (Despres & Chauvel, 2000).

In recent years more emphasis has been placed on organizational processes, such as Enterprise Resource Management applications, such as SAP, that hold significant knowledge about an organization, its structure, processes and strategies. The challenge with these tools is to give the information to its users in a meaningful way.

### **Knowledge Barriers**

There are many barriers to knowledge management as well as the usual issues of time and money needed to start this initiative. At the root of this is that knowledge sharing is not natural, and even though most people don't mind sharing what they know

with others, it requires that this be done intentionally and following the guidelines set by the organization. The biggest barrier is the organization's culture. It is hard to get people to do things differently. People either do not want to change or cannot change quickly. Some people are too busy and do not have time to learn. There could be a lack of motivation for this change and also constant turnover of staff. Managers can also be barriers if they fear giving up power or have difficulties passing on what they know. They could challenge the traditional company style. Sometimes the structure is not set up appropriately to support knowledge management. These could be inflexible, fragmented and separated into functional silos. There are also the issues with sharing of knowledge, perhaps making available information that some in the organization see as confidential. Because all of these issues are potential barriers to the implementation of knowledge management, it is critical that this be led by senior leadership and be well thought out, planned and executed in a way that minimizes or addresses these issues (Despres & Chauvel, 2000).

Another barrier is that senior executives do not have a clue about knowledge walking out the door. DeLong (2004) suggests that succession planning should be considered at all levels of the organization. He advises companies not to incentivize people to retire early, rather to try to keep their mature workforce and find ways to capture the knowledge before they leave. However, there are several barriers to keeping employees and tracking their knowledge before they leave. DeLong listed the following:

- There is no real ownership of the problem. Who owns it? Is it HR? Management?
- Costs of lost knowledge are often hidden.

- Companies need to look for creative ways to keep younger people engaged while they hang on to older workers (2004).

Other challenges faced in the field of knowledge management are that some organizations have not yet resolved the most common barriers:

- Role clarification- there are different views about whether people in knowledge management roles should work part-time or full-time as knowledge managers or if these practitioners should wear two hats, that of the subject matter expert in knowledge management and that of a consultant in a different field. There are also debates over the need for a specialized field in knowledge management. Some believe the skills are unique and hard to develop while others see the tasks as not so difficult.
- Performance, incentive, and measurement systems- some believe that changes in performance and incentive systems are needed to incentivize employees to want to learn. Measurement, however, is hard to do. Tracking what is shared is easier to document, while knowledge that is used is harder to track.
- Tacit knowledge: capture and transfer- tacit knowledge is the most difficult to share throughout the organization. One of the biggest reasons why this is difficult can be seen in employees who lack experience in making the effective use of the new ideas and knowing how to effectively use the resources available to them (Garvin, 1997).

Performance pressure can also be seen as a critical barrier faced by teams to effectively utilize their collective knowledge. Project teams are often used to bring together members of diverse knowledge and backgrounds for the benefit of an integrated

and more creative outcome. An assumption here however, is that expertise translates into performance benefits. The second assumption here is that employees actually use one another's expertise. Studies suggest that the link between team members' recognizing and then actually using others' expertise can be highly challenging and that performance pressures tend to force teams to default to high-status members. In other words, performance pressure may result in teams reverting to less effective ways of influencing, which leads to lower team performance overall (Gardner, 2008).

### **Building Learning Organizations**

One way to overcome some of the barriers mentioned above is for organizations to become learning organizations. Senge (1990) believed that human beings naturally gravitate towards learning, but that our society has always been more controlling over what we do, rewarding individuals for performing the orders of others rather than for cultivating their natural curiosity to learn. He believed that one must understand how organizations learn and that only by accelerating the organization's learning capabilities would organizations be able to compete in today's more competitive environment. This view of learning organizations as those that can accelerate their learning emphasizes their ability to adapt. He called this ability to increase adaptability, the first stage in moving toward a learning organization. He believed that our natural human impulse to learn is also an impulse to create meaningful data. Senge described leading corporations as those focused on learning, with the ability to create new data as well as to adapt to new ways of learning.

Six years after Senge's popularity with the concept of learning organizations, the American Society for Training and Development (ASTD) conducted a survey of HR

executives, which showed that 57% of the respondents thought that becoming a learning organization is *very important* or *important*. When asked if they planned to take steps towards becoming a learning organization, 45% said yes, 40% said no and 15% said they did not know. Surprisingly, 60% said the number one barrier to becoming a learning organization was that there was no clear understanding of organizational learning in their organizations, a big problem (Preskill & Torres, 1999).

According to Senge (1990), leaders play a key role in developing learning organizations. In a learning organization a leader's role differs dramatically from that of a charismatic decision maker. In a learning organization leaders need to be designers, teachers and stewards. These roles require new skills including the ability to build a shared vision, to bring up to the surface and challenge existing mental models and to foster more systemic patterns of thinking. He believed that leaders in learning organizations are responsible for building organizations where people are continually expanding their capabilities to share their future, that is, leaders are responsible for learning. He said that leaders engaged in building learning organizations naturally feel part of a larger purpose that goes beyond their organization. They are part of changing the way they do business so that their efforts will produce more productive organizations capable of achieving higher levels of organizational success and personal satisfaction.

According to Argyris (1991), while success in the marketplace depends on learning, most people don't know how to learn. Most companies not only have the challenge of addressing this dilemma, they are not even aware that it exists. He attributes this to a misunderstanding of what learning is and how to bring it about. As a result they make two mistakes in their efforts to become learning organizations. First, they define

learning as merely problem solving, so they focus on identifying and finding solutions to errors in the environment. However, they are skipping a critical step, that of reflecting on their own behavior in order to identify the ways they may have contributed to the organization's problem. The second mistake most organizations make is the assumption that getting people to learn is largely a matter of motivation. So, companies invest in creating new organizational structures that are designed to create motivated employees. However, learning is not simply a function of how people feel. It is reflection of how they think, and reason in order to support and implement their actions.

There is however, reason to believe that organizations can skip these commonly made errors. Reality is that most people genuinely strive to produce good work and feel good about their contributions. None to very few people go to work with the intentions of doing a bad job. Most want to be seen as competent and their self-esteem is tied up with behaving consistently and performing effectively. Companies can use these natural human tendencies to teach people how to reason in a new way and reshape their behavior. The first step is for senior leaders to review their existing processes, and create the necessary changes so that people's natural tendencies are leveraged. Learning to reason productively can be of great payoff to the organization (Argyris, 1991).

### **Knowledge Management and the Aging Workforce**

The baby boom generation, defined as people born between 1946 and 1964, is the largest demographic group in the United States, with nearly 80 million people. In 2008, the first members of the baby boom generation reached age 62. Projections show that nearly 25 million baby boomers will hit retirement age by 2013. By 2018, the numbers will continue to increase dramatically (Leonard, 2008).

Figures from September 26, 2008 by the U.S Labor Department's Bureau of Labor Statistics demonstrate that older workers, when compared to younger workers, tend to remain with the same employer for longer periods of time positioning themselves a valuable source of organizational knowledge (Hastings, 2008). The challenge is that most organizations are not doing what is necessary to transfer knowledge from these older workers and are not aware of the risk their organization could face.

There are differences on how companies deal with the aging workforce when comparing small and large companies. According to the National Association of Professional Employer Organizations (NAPEO), in a survey of 404 small business owners released on March 5, 2008, 28 % of the respondents reported they had developed plans to transfer the knowledge and skills of their older and more experienced workers to younger employees (Leonard, 2008). This could be because of their smaller number of employees; losing one can be more impactful to their organization than if you had a large company where employees could be easily replaced.

Another study released by Monster Worldwide, Inc, in September of 2007 found that knowledge retention does not appear to be a high priority among organizations. Approximately 20% of respondents to the Monster survey reported that they were developing plans for knowledge and skills transfer from older workers. "While institutional knowledge is increasingly an organization's most valuable asset, our study found that many companies do not have the process in place to preserve and redistribute this critical information," said Jesse Harriott, vice president of research for Monster Worldwide (Leonard, 2008, p.2).

A separate study of 2,719 respondents between the ages of 55-70, conducted by



MetLife Mature Market Institute, found that mature workers are struggling to balance the conflicting pressures of income security, post-retirement-age employment and often age discrimination as they look for a sense of security and meaning in their retirement years. The study found that 78% of respondents age 55-59 are working or looking for work, as are 60% of 60 to 65 year olds and 37% of 66-70 year olds. Results showed that the working retired are drawn back to work looking for meaningful activity (McConnell, 2006).

Organizations need to ensure that baby boomers are motivated to mentor or coach others to ensure their knowledge remains with the organization once they retire. The first step is to ensure that baby boomers are aware of the expectation that they need to transfer knowledge. This is something that should be seen as a compliment by the employee, a sign that the information they have gained throughout their careers is meaningful and that they can add value to the organization. Organizations also need to make sure the right processes are in place for this sharing of information to take place (Hastings, 2008).

### **Attracting and Retaining Mature Workers**

As discussed, mature, experienced employees play a key role in transferring organizational knowledge and essential skills to less experienced employees.

Organizations can leverage the business knowledge of baby boomers by using a variety of strategies to promote internal knowledge transfer and intergenerational learning. For example, Dow Chemical has a formal mentoring program that matches mature employees with a group of young employees and the two meet on a regular basis to check in and share business experiences, with the older workers serving as a sounding board. Northrop Grumman encourages knowledge transfer through established communities of practice,

which facilitate cross-divisional knowledge sharing during in person meetings and online forums (SHRM, 2006). According to a survey conducted by The Conference Board in 2003, some companies offer incentives to motivate and retain mature workers. The following are some of these incentives:

Table 3

*Sample of Incentives*

Incentives	% Offer
Flexible work arrangements (e.g., telecommuting, compressed workweeks)	41%
Training to upgrade skills	34%
Time off for volunteerism	15%
Phased retirement	14%
Reduced shift work	14%

*Note.* Adapted from Munson, H. (2003). Valuing experience: How to motivate and retain mature workers. The Conference Board. [www.conference-board.org](http://www.conference-board.org).

Providing flexible work options was a key step that organizations have taken to prepare for baby boomers retirement. Below are some of these steps:

Table 4

*Preparing for Retirement*

Steps	Have Taken	Plan to Take
Providing flexible scheduling (e.g., job sharing, telework, etc.)	40%	22%
Developing succession plans and replacement charts	36%	38%
Increasing recruiting efforts of younger generations	36%	35%

(continued)

Steps	Have Taken	Plan to Take
Hiring contingent workers (e.g., consultants, temporary workers)	33%	21%
Providing managerial training to give managers the tools to increase retention of baby boomers	29%	26%
Providing opportunities for workers to transfer to jobs with reduced pay or responsibilities	29%	21%
Developing processes to capture institutional memory/organizational knowledge	28%	44%
Increasing retiree recruiting efforts (including bringing back retirees)	26%	17%
Creating positions/redesigning positions that allow near-retirees to ease into retirement (i.e., phased/gradual retirement, bridge employment, reducing work hours or offering part time work)	25%	24%
Providing a retiree job bank (for the hiring of retired employees for specific projects)	12%	19%

*Note.* Collison, J. (2005). 2005 future of the U.S. labor pool survey report. Alexandria, VA: Society of Human Resource Management.

When managing the mature workforce, it is important to keep in mind that intergenerational differences in values, preferences, working styles and career expectations have the potential to cause conflict and performance issues. However, if these differences are properly addressed and an organization has the ability to leverage the skills of its various generations and can facilitate the transfer of key knowledge, this can result in greater organizational effectiveness (SHRM, 2006).

### **Knowledge**

Having said that an organization's competitive advantage is determined by how well it leverages the knowledge of its people, it is Human Resources (HR) who plays a key role in enabling this transfer of knowledge to the organization. As a strategic business partner, HR can help achieve organizational success through the development of

tools and resources to help with retention and the transfer of organizational knowledge. Other key variables for HR include helping to build trust and strengthening relationships across the organization.

One way HR professionals can leverage generational diversity is by employing strategies that capitalize on similarities among generations. For example, many organizations find that younger generations value flexible work arrangements while at the same time, such arrangements provide mature workers with more opportunities to continue working. Also, challenging work experiences promote career development and are valued across generations. Three strategies that HR professionals can use to manage generational diversity to enhance performance of the organization as a whole are:

1. Offer choices in work arrangements and career development
2. Offer training opportunities that provide skill development and enhance career growth
3. Offer an evolving workplace, employing innovative management and motivational techniques that take advantage of the strengths of each generation (Sujansky, 2004).

The aging of the workforce is expected to cause high levels of turnover, resulting in the loss of short- and long- term knowledge critical to organizational functioning. HR professionals will be confronted with the challenge of replacing skilled workers and developing new leaders. Yet, age-related turnover presents many opportunities to address key HR issues, including increasing employee engagement and diversity, transitioning to a performance-oriented culture, and aligning formal and informal organizational structures to further performance. The main link between negative or positive outcomes of age-

related turnover is the loss of knowledge and experience, indicating that organizations that employ initiatives to capture and retain knowledge and experience of mature workers can minimize the negative impact of turnover. Establishing communication, advice and knowledge networks and focusing on training that promotes organizational learning and knowledge transfer are two ways that HR professionals can address the issue of knowledge loss of mature workers (SHRM, 2006).

According to Marc J. Rosenberg (2000), author of *E-Learning: Strategies for Delivering Knowledge in the Digital Age*, HR can provide the balance needed during knowledge management implementation. He says that most companies fail in implementing knowledge management systems because they forget the factors that will motivate the people to use these systems. Too much emphasis is placed in technology and other factors that impact people, such as the culture, are ignored. Some of these factors also include how people are treated in the organization, the level of trust between people and the incentives in place. What is the organization doing to recognize those who share their knowledge for the benefit of the organization? What do the current incentives reward? Because HR knows the people in the organization and the culture, HR plays a key role in implementing knowledge management systems in a way that meets the needs of the people, the job functions and motivates people to share and leverage the knowledge of its workers.

In order to effectively manage intellectual capital and implement a knowledge management system an organization must first be able to do the following:

1. Define what the organization needs to know/be able to do and who needs to know it/do it.

2. Determine what the organization does know/can do and who knows it/can do it.
3. Identify *need to know--know* and *need to do--able to do* gaps.
4. Formulate a strategy to close these gaps.
5. Create the vision/mission, culture, environment, strategy, structure and human resource strategies/programs that will facilitate effectiveness in the short run and sustain it over the long term through continuous learning (Greene, 2001).

Once this is well understood, HR can contribute to effectively managing intellectual property in the following areas:

1. Define, evaluate and shape culture.
2. Design the organizational structure and define employee roles.
3. Formulate staffing and development strategies and design programs.
4. Formulate performance management strategies and design programs.
5. Formulate rewards strategies and design programs (Greene, 2001).

A supportive culture must be in place in order to most effectively manage the intellectual capital. The culture must be such that knowledge sharing is asked for and rewarded, people are given resources to facilitate it, people are trained in the skills required to do it and the structure, role design and staffing levels enable it to happen. One way to assess the effectiveness of the culture in supporting a knowledge sharing organization is by conducting a cultural assessment. The assessment will measure the culture's effectiveness for the implementation and application of intellectual capital. If the organizational culture is not ready for this type of knowledge sharing and instead encourages silence and conformity to minimize conflict then the flow of communication

and the creation, dissemination and application of knowledge will be impeded. HR plays a key role in conducting this cultural assessment and determining the organization's readiness for a knowledge management system implementation (Greene, 2001).

In today's knowledge economy, as discussed, knowledge management is increasingly essential for organizational success. Cooperation, networking and collaboration are key in knowledge management. Two major workplace shifts make knowledge management both essential and challenging, the changing nature of the work itself and the changing nature of the work environment becoming increasingly global and virtual. Critical aspects of knowledge management help to ensure effectiveness of collaboration and sharing to build a knowledge organization. By focusing on strategic learning capacities, HR can promote knowledge management as a strategic business objective. Some examples include emphasizing training and development, focusing on professional development, and establishing policies and practices for employee talent retention through internal promotions, knowledge sharing taskforces and an overall commitment to excellence. HR initiatives that connect employees, professional opportunities and accomplishments help retain knowledge workers. The working environment is also important for retention (SHRM, 2008).

The following four knowledge management practices are tools that foster learning, knowledge sharing, retention and transfer: communities of practice, storytelling, knowledge retention practices and leadership development.

1. Communities of practice- by bringing together groups that cross organizational boundaries (various teams, business units, divisions), HR can promote knowledge learning and sharing. Open dialogue, different levels of

participation and a focus on value are key factors for this to be effective.

2. Storytelling- storytelling teaches lessons, exchanges ideas, changes behaviors and builds community. HR can use storytelling to illustrate corporate values and promote workplace behavior. The advantages are that people tend to listen to stories receptively, stories are memorable and stories can inspire heroic behaviors and stories can forward change. In the business world, storytelling in the form of business anecdotes is a powerful corporate communication tool.
3. Knowledge retention practices-actions that demonstrate a positive organizational reputation have a direct impact on retention. Organizations that take social responsibility seriously and give back to the community are viewed positively.
4. Leadership development- building leadership capacity prepares the organization to rise above. A firm's performance depends on the development and management of knowledge, through and within its leaders (SHRM, 2008).

From the HR viewpoint, knowledge management is also about the ethical management of people. Knowledge sharing fosters creativity and innovation for competitive advantage. However knowledge exchange cannot be at the detriment of the organization. At some point, HR may be involved in ethical investigations related to inappropriate knowledge sharing, such as confidential information, trade secrets, intellectual property, etc. Keeping in mind the following factors will help to frame the issue when evaluating situational ethics about knowledge management. Rating these factors as yes, no, or maybe can help HR and an ethics taskforce consider possible ramifications during an investigation. The factors include:



Table 5

*Knowledge Management and the Ethical Management of People*

Factor	Consideration
Involvement	Have all shareholder viewpoints been considered?
Fairness	If I were the shareholder, would I see the decision as fair?
Consequences	Have we considered all of the consequences of the decision?
Relevance	Have we gathered all the information possible to make an informed decision?
Corporate values	Does the decision uphold the organization's values?
Community	Would we want this decision to become global law, applicable to all such situations?
Shame	If the details of the decision/action plans were disclosed to everyone, how would we feel?

*Note.* McElroy, M. (2003). Adopted from Graff, T. R. & Jones, T. P. (2003).

In today's economy, knowledge management is critical to ongoing organizational effectiveness, sustainment and profitability. Yet, knowledge management cannot occur in a vacuum and requires commitment on the part of HR and senior management to effectively utilize this strategic tool for competitive advantage.

There is a need for HR to step up and lead during these tough economic times because executives are so distracted by economic issues, yet talent and the need to move forward continue to be central. The ability to be agile and do whatever it takes to listen, pay attention, read signals and adjust to the needs of the business is key. The goal is to communicate more and be more connected to the people and the business. The article suggests the following strategic questions for HR that can help HR professionals to adapt as the economy continues to change. These include:

- What drives our business?

- What are growth levers? In other words, how does the organization make money? HR must understand this to identify and grow talent.
- What role does talent play?
- What are the pros and cons of the organization's culture?
- How do we get efficient and stay effective?
- What is necessary to attract and nurture our talent needs?

The article describes the following as critical HR initiatives that HR professionals must keep top of mind:

- There is more intense global competition for top talent.
- HR must leverage talent for the benefit of the business. Focus on future-oriented approaches such as knowledge transfer, mentoring, growth opportunities, flexible schedules, and incentive rewards.
- Execute a cohesive talent strategy in order to stay competitive
- Have an energized and committed workforce- a key component to success
- Develop great general manager talent
- Update the employee value proposition. Learn what is important to workers (Bureau of National Affairs, 2009).

## **Conclusion**

The definition of knowledge management continues to evolve. It started simply as being valuable information in action, with value being determined by the organization and the recipient to a discipline expected to show a return on investment. For some organizations knowledge management is about fostering the creation of a learning organization. Others want to reduce operational redundancy by improving

communication and collaboration. Still others may want to improve data and information collection so that all departments are working from the same page (Wilson, Barnfield, & Leheny, 2002).

Knowledge management comes down to recognizing that the experiences and ideas of the staff in any organization provide a crucial source of competitive advantage. Organizations have the ability to do this by creating and fostering environments where people can learn from one another and feel encouraged to do so, and where all staff understand the relationship between individual, team, and organizational performance. Why waste time and energy reinventing the wheel?

If organizations want to remain relevant and competitive in today's market, they must transform themselves into learning organizations by creating systems and processes that support the five main activities of a learning organization: problem solving, experimentation, learning from their own experience and history, learning from the experiences and best practices of others and transferring knowledge quickly and efficiently (Davidson & Voss, 2002). It is critical that organizations integrate these five steps into the fabric of their operations in order to foster an environment that is conducive to learning.

In a world of increasingly scarce human resources, knowledge management is about attracting the right people, keeping them challenged, treating them well, and allowing them to shape part of the organization. As discussed, mature, experienced employees play a key role in transferring organizational knowledge and essential skills to less experienced employees. Organizations can leverage the business knowledge of baby boomers by using a variety of strategies to promote internal knowledge transfer and

intergenerational learning.

HR must be a key player in the implementation of knowledge management as they have the expertise in dealing with people and creating strategies that will lead to organizational effectiveness. If this can be done efficiently, this is a great opportunity for HR to demonstrate that they are key contributors to the bottom-line and overall success of the company.

Given Chapter One and Chapter Two, and the lack of literature on knowledge management that is specific to how it is utilized and leveraged in theme parks, it is appropriate that this study be conducted in order to provide theme parks insights into resources and processes that can help them continue to grow and compete in today's challenging economy.

Their ability to grow and compete will increasingly depend on their ability to access and utilize the knowledge that is stored in the heads of their employees, especially those who are close to retirement. Why let them walk away with so much of the company's knowledge? Now is the time for organizations to take action and prevent this knowledge from walking out the door.

“Ask me what is the most important thing

And I will reply

It is people,

It is people,

It is people.”

Maori proverb.

## **Chapter 3: Methodology**

### **Introduction**

Companies are seeing valuable knowledge leave the organization as older workers eventually retire taking with them all their knowledge gained. According to the Society for Human Resource Management (SHRM, 2009) few companies have begun to focus on knowledge transfer from older to younger workers. However, due to the economic downturn, many Baby Boomers will remain in the workforce longer than planned. Therefore, the time is critical for organizations to act now. In order for organizations to remain competitive, organizations must learn a way to leverage their biggest asset, their people.

The study was conducted to understand what theme parks could do to leverage the knowledge base of its retirement workforce before they leave the company, which factors prevent or influence this knowledge transfer and the role of Human Resources in enabling a knowledge sharing organization. A series of interviews with individuals who have retired from the theme park industry and human resources professionals in the theme parks were conducted. The goal was to understand current state, the specific barriers or challenges that prevent this transfer of knowledge as well as those factors that enable effective knowledge sharing, and the role of HR in this process.

### **Restatement of the Problem**

The time is now for organizations to leverage the knowledge base of its employees, specifically of their retirement workforce. As mentioned in Chapter 1, the number of long-term unemployed workers has increased sharply since the recession began in December of 2007. In November of 2009, according to the U.S. Bureau of

Labor Statistics, the unemployment rate of the United States hit an unprecedented high at 9.8% as many companies reduced their labor force while restructuring lines of businesses to address organizational imbalances. During these workforce reductions many companies saw people take with them much of the organization's knowledge as well as the individual's tacit and explicit knowledge that was developed throughout their tenure with the company and professional and personal lives. Companies are also seeing valuable knowledge leave the organization as older workers eventually retire taking with them all their knowledge gained. The costs can be tremendous when the impacts of lost knowledge are unanticipated.

An industry that is seeing this loss of valuable knowledge as older employees retire is theme parks. The diversity of functions and roles required to run theme parks, as many as 3,000 seen at Walt Disney World in Florida and high turnover within the industry, as high as 50%, create an even greater need to have knowledge management practices in place in order to leverage the knowledge of its employees, especially of those who have mastered their roles and are ready for retirement (Anton-Clavé, 2007). So, why aren't theme parks doing something to help transfer the knowledge from their most senior workers to younger ones? The time is critical for theme parks to act now.

### **Restatement of Research Questions**

The major research questions that were addressed in this study are:

- To what extent, based on the perception of those who have retired, does a theme park leverage the knowledge base of its employees before they leave the company?
- What are the perceived factors that impact or influence this transfer and

applicability of knowledge?

- What can the Human Resources Department do to assist a theme park to better leverage the knowledge base of its retirement workforce?

### **Description of Research Methodology**

An interactive qualitative study, using grounded-theory method was conducted. A qualitative research design was most effective for my study because I wanted to create an understanding from the data collected and not necessarily test an understanding already framed. “Qualitative research helps us make sense of the world in a particular way. Making sense involves organizing the undisciplined confusion of events and the experiences of those who participate in those events as they occur in natural settings” (Richards & Morse, 2007, p.4).

A grounded-theory methodology refers to any approach to forming theoretical ideas that somehow begin with data. The researcher collects primarily interview data in order to gain a variety of perspectives on the phenomena and then uses constant comparison to analyze across categories of information. A story line is then created, suggesting a conditional matrix that specifies the social and historical conditions and consequences influencing the phenomenon (McMillan & Schumacher, 2006).

I conducted face-to-face interviews with different groups, specifically with those who had retired from theme parks and HR professionals in theme parks in order to collect the data. To ensure validity in my research, I followed the two general rules recommended by Richards and Morse (2007). The first rule is to pay attention always to the fit of question, data and method. This ensures the data is appropriate and appropriately handled and the question addressed fully and responsibly. In order to

achieve this I will check the reliability of coding. The second general rule is to ensure that you can properly account for each step in the analysis. To do this, I set up a process to log each significant decision and interpretation of each discovery. This was a critical step that served as the justification of where I arrived and what I discovered.

### **Definition of Data Gathering Instruments**

The following materials and instruments were used to make and collect data.

- Unstructured, interactive interviews- this is the most common type of qualitative interview that offers the participant an opportunity to tell his or her story with minimal interruption by the researcher. Relatively few prepared questions are used and the researcher listens to and learns from the participant allowing for probing to be used as necessary (Richards & Morse, 2007).
- Field Notes- a method of recording observations made by the researcher and also records of the actual words said by the participants (Richards & Morse, 2007).

### **Description and Validity of Data Gathering Instruments**

The most appropriate method for this study was to conduct unstructured, interactive interviews. This type of interview allowed each participant to tell his or her story with minimal interruption by me. Unstructured interviews are most appropriately used in studies where the researcher seeks to learn primarily from respondents what matters or how procedures are understood (Richards & Morse, 2007). Interviews permit greater depth, allow probing to obtain more complete data and provide a means of checking and assuring the effectiveness of communication between the respondent and the interviewer (Isaac & Michael, 1997).



I selected a comfortable setting for the interviews. The settings were locations within or outside of the theme parks, depending on the needs of the interviewees. I served as the interviewer for all the interviews. Each interview was scheduled for one-hour. I took written notes with the permission of the participants. The following guidelines recommended by Isaac and Michael (1997) were used to frame questions during the interview:

- Use language that insures effective communication between the interviewer and the respondent. Omit all ambiguous vocabulary
- Make certain respondent appreciates the purpose of each question asked
- Avoid leading questions which suggest a desirable or preferred answer
- Insure the frame of reference surrounding each question is clear so that each respondent hears the question in the same way, avoiding misinterpretation

Once the questions were written, I used the following criteria, also suggested by Isaac and Michael (1997), to ensure the questions most effectively provided me with the necessary data:

- Is the question related to the research problem and objective?
- Is the type of question the right and appropriate one?
- Is the item clear and unambiguous?
- Is the question in any way leading?
- Does the question demand knowledge and information that the respondent does not have?
- Does the question demand personal or sensitive information that the respondent may resist? (p. 147).

A common error in questionnaire studies is that the researcher does not give enough attention to the questionnaire and fails to pretest it (Isaac & Michael, 1997). Therefore, I took some additional time to conduct a pilot test prior to my data collection in order to pretest my questions. This pilot test ensured I had the appropriate questions that provided me with the data needed for my study. This pilot test also ensured that the questions were understood and interpreted appropriately. I tested my questionnaire with 2 HR managers and 2 retired employees from another organization in the entertainment industry, not the theme parks where my study took place.

### **Selection of Participants**

I used a purposeful sampling strategy to select my participants since purposeful samples are chosen because participants are likely to be knowledgeable and informative about the phenomena the researcher is investigating (McMillan & Schumacher, 2006). I selected two groups as the subjects for these interviews.

The first group consisted of 11 individuals who have retired from the theme parks. “While there are statistical rules for probability samples size, there are only guidelines for purposeful sample size. Thus, purposeful samples can range from 1 to 40 or more” (McMillan & Schumacher, 2006, p. 319). In order to obtain participants who met the criteria, I attended a meeting of the theme parks retiree club to solicit volunteers. All members of this club have retired from theme parks. I also used the nominated or snowball sampling technique to solicit participants. This technique allows participants already in the study to recommend others to be invited to participate (Richards & Morse, 2007). The techniques I used to solicit participants allowed me to select people who have retired from different roles in the organization as well as from different levels in the

organization. My goal was to interview people who represented the operations workforce (those who interact with the guests or customers) as well as the professional services teams (those who provide support to the operations team). I made sure that the participants I selected also represented hourly and salaried populations. It was important for the participants of this study to represent these categories in order to determine if there were similarities or differences between those who had retired from operations and professional services and between hourly and salaried roles.

The second group consisted of eight individuals who perform the role of HR Business Partners at the theme parks. HR Business Partners are senior managers in the organization and they have the ability to influence senior leadership to implement processes that enhance the effectiveness of the organization, such as knowledge management practices. I have chosen to have a smaller sample size of HR professionals than retirees because there are approximately 12 HR Business Partners in the organization. Using the sample size guidelines provided by McMillan and Schumacher (2006), which include reviewing the purpose of the study, the availability of informants and potential redundancy of the data, I believed that having a minimum of 6 participants would provide me with sufficient data to analyze. I also selected HR Business Partners who support operations teams as well as professional services teams to determine if there are any similarities or differences between these two populations. I sent an email to the HR Business Partners of the theme parks to solicit volunteers for this study.

I chose the theme parks as my site for this study because it is an organization with a high concentration of knowledge workers. This site is also most familiar and accessible to me as this was my place of work.

## **Discussion of Data Analysis**

I used the editing analysis style because it is less prefigured. According to McMillan and Schumacker (2006) this style allows the interpreter to search the data for parts to illustrate categories of meaning and write memos during the process. Through the use of this inductive analysis, categories and patterns emerge from the data. The technique of comparing and contrasting was also used since the goal was to find similarities in the data in order to come up with my theory.

The first step before analyzing the data was to write down my three research questions, as suggested by Auerbach and Silverstein (2003) in order to prepare to organize and guide the data. They stated that by doing this I would be able to keep the data manageable by focusing on data that related to my research questions.

I conducted interim analysis during my data collection. This served two purposes: (a) make data collection decisions and (b) identify recurring topics. During each interview I took notes to identify possible themes, interpretations and questions. I then grouped the data under each research question. My comments were kept separate from the actual data and I marked them with parentheses. Immediately following each interview I completed and typed my handwritten notes using the guide suggested by McMillan and Schumacher (2006). They recommended editing my notes and putting it into a final form so that it would contain accurate verbatim data and notations of nonverbal communication with initial insights and comments to enhance the data. The final form included the date, place, and participant identity. As suggested, I wrote an interview elaboration of each interview session. This was a self-reflection summary of my role and rapport, the interviewee's reactions, and additional relevant information.

I performed topic coding to manage my data. Topic coding is an analytical activity that requires creating a category or recognizing one from earlier and reflecting on where it goes among the growing ideas. The purpose of topic coding was to provide accurate descriptions of the varieties of retrieved material and to provide new ways of access to data by combining codes in sophisticated searches. I achieved topic coding by marking up my notes using lines with different colors for each topic. During coding, the data made categories as I was alerted to concepts, themes, patterns, and surprises with new meanings. In this process, new categories surfaced if an existing code did not fit the data or if the new data suggested several dimensions of the category (Richard & Morse, 2007).

As I identified categories, I grouped them as *Research Question #1*, *Research Question #2* and *Research Question #3*. This process helped me to always think of my research questions and helped me to eliminate unnecessary data, or data that did not seem to fit in with the study, and created a way for me to ask myself these questions: “Does this text relate to the research concern; does it help me understand the participants; does it clarify thinking; does it simply seem important, even if I can't say why?” (Auerbach & Silverstein, 2003, p. 44).

I followed the following tips for coding as suggested by Richard and Morse (2007):

- Code as you learn- as data comes in, I should think about it, prepare it for analysis and code it. I should avoid letting data built up as a backlog of data makes it harder to use and see thin areas in the data that could be used to guide future data making.

- Always see coding as reflection- I should see coding as a theorizing activity, not as a stage of data preparation prior to thinking. I need to keep revisiting each category and reviewing what is coded, and whenever is surprising or interesting, writing a memo.
- Never code more that you need- My data management system should allow me to return easily to the context or the full document to think and maybe code some more. I should code for anything I am likely to want to ask questions about.
- Manage your codes- I need to keep in mind that analysis does not stop with coding. I need to think of coding categories as concepts I work with. I should revisit my categories to ensure I am being consistent and check if new themes are coming up.
- Monitor coding consistency- because qualitative coding is primarily interpretive, two researchers will rarely produce identical coding. Therefore, I need to monitor and revisit and debate my coding making it part of the process of analysis. It is also suggested that I document and track my use of these methods.

As stated earlier, the goal of a grounded-theory study is to form theoretical ideas that somehow begin with data. Therefore, once I identified the patterns for each research question, I developed theory by exploring the relationship between each pattern in order to come up with my storyline or theory in a narrative way. The results of my study included a narrative that answers each of the three research questions.

### **Restatement of Methodological Assumptions**

There were a couple of assumptions that applied to the study. The first assumption was that the appropriate questions were asked to solicit the data collected. The second assumption was that during the interactive process between the researcher and the participants, the participants provided valid data or in other words, they were truthful. The third assumption was that my corporate experience, as the researcher, helped to provide insight into the participant's experiences within the industry. It was assumed that I, as the researcher, was able to put aside all biases and interpret the data fairly and without prejudice (Creswell & Miller, 2000).

### **Restatement of Limitations of This Study**

There was the possibility of bias in both the participants and the researcher due to the close association with the subject matter and the population. Another limitation was that the data collected would only apply to the theme parks being studied and the results would not be descriptive of other theme parks nor the entertainment industry as a whole.

Also, the use of verbal interviews as the primary source of raw data could have limited the extensiveness of the responses by the participants (Creswell & Miller, 2000). The viewpoints of the participants could have been overly biased or reflective, consequently diminishing the possibility of common themes.

### **Ethical Assurance**

Full disclosure was provided to all research participants explaining the purpose of the research and that their participation was optional, with the option to stop the interview at any time. A formal letter of permission and Informed Consent Forms were used. The identity, privacy and confidentiality of all participants were carefully protected. The HR

and Research departments of the theme park, where the study was conducted, were asked to review and approve the study. The Institutional Review Board (IRB) was asked to review and approve the study prior to the initiation of data collection. All data collected was securely stored.

### **Plans for IRB**

The researcher was in full conformance with the review process of the Institutional Review Board for Human Subjects. The researcher submitted an application in order to protect the rights and welfare of human subjects participating in my study and to remain in compliance with the Federal Policy for the Protection of Human Subjects (45 CFR 46) and the Federal-wide Assurance (FWA) enacted between Pepperdine University and the Office for Human Research Protections (OHRP) under the Department of Health and Human Services (DHHS).

### **Summary**

According to the Society for Human Resource Management (SHRM, 2006) few companies have begun to focus on knowledge transfer from older to younger workers. However, due to the economic downturn, many Baby Boomers will remain in the workforce longer than planned. Therefore, the time is critical for organizations to act now.

This interactive qualitative study, using grounded-theory method, was conducted to understand what theme parks could do to leverage the knowledge base of its retirement workforce before they leave the company, which factors prevent or influence this knowledge transfer and the role of Human Resources in enabling a knowledge sharing organization. A series of face-to-face interviews with individuals who have retired from



the theme park industry and human resources professionals in the theme parks were conducted.

I conducted interim analysis during my data collection. During each interview I coded the data, made notes to identify possible themes, interpretations and questions. I then grouped the data under each research question.

The purpose of the study was to understand current state, the specific barriers or challenges that prevent this transfer of knowledge as well as those factors that enable effective knowledge sharing, and the role of HR in this process.

## Chapter 4: Data Results

### Introduction

An interactive qualitative study was conducted following the methodology described on Chapter 3. I conducted 19 individual face-to-face interviews with two different groups, 11 with those who have retired from theme parks and 8 Human Resources professionals in theme parks, in order to collect my data. The participants from the retirement group were divided further into two separate areas, 5 from Operations and 6 from Professional Services. The retired participants interviewed had a wide range of years since their retirement from theme parks, from 17 years to 1 year ago and their years of service ranged from 15 to 43 years with the company.

The major research questions that were addressed in this study are:

- To what extent, based on the perception of those who have retired, does a theme park leverage the knowledge base of its employees before they leave the company?
- What are the perceived factors that impact or influence this transfer and applicability of knowledge?
- What can the Human Resources Department do to assist a theme park to better leverage the knowledge base of its retirement workforce?

One of the key steps of my methodology was to pull themes for each of the three research questions after each interview. This process helped me to focus on my research questions and helped me eliminate unnecessary data, or data that did not seem to fit in with the study. The section below captures my data in the same manner that it was collected. I will share the themes that surfaced for each of the research questions by

group, retirees (for Operations and Professional Services) and Human Resources.

### **Themes for Retiree Participants**

*Research Question #1: To what extent, based on the perception of those who have retired, does a theme park leverage the knowledge base of its employees before they leave the company?*

#### *Research Question #1- Themes for the Operations Group*

- All 5 participants felt that there are no company efforts in place to leverage the knowledge from those retiring. As one participant stated, “I felt awkward, I had spent 21 years with the company and no asked me to share any of my knowledge, no download, no questions asked, no calls afterwards either”.
- All 5 participants shared that there are well documented standard operating guides for each of the hourly roles within operations. Because of the risks associated with the handling of money, food, heavy machinery, rides and people, these standard operating guides are updated frequently, heavily regulated and used to train new employees. All participants shared that because their tasks and responsibilities are well documented and there are multiple people performing the same role, there is no need to capture the technical knowledge of those retiring from operations. One participant shared, “There were so many people who could do my job; we were training people almost every day because of the high turnover in Operations. There was no need for me to teach anyone what I was doing”.
- All 5 participants shared that knowledge transfer is evident in the organization during the on-boarding of a new employee, ensuring they are well trained on

their tasks; however, there is no evidence of knowledge transfer during the off-boarding process. One participant stated,

We were so good at training new cast members, they go through training at the university first; they then get an overview of our area and then receive 3 days of on-the-job training. We spent a lot of time making sure they knew how to perform their jobs. But what about when we leave, no one took the time to help me with the exit process.

*Research Question #1- Themes for the Professional Services Group*

- All 6 participants shared that there is no to minimal effort by theme parks to leverage the knowledge from those retiring. 3 participants shared that they took the initiative to transfer knowledge to their peers, but nothing initiated by theme parks. One of them stated, “the company didn’t know what I knew and I wanted to leave on a good note, so I started documenting my work, my key contacts and took the initiative to update my manager on my work”.
- All 6 participants mentioned that knowledge transfer is evident in the organization when theme parks are undergoing major expansion efforts and they need to train new employees or when in the process of introducing new technologies. This knowledge transfer usually includes the documentation of processes. One participant shared,

To prepare for the expansion and opening of the new theme park, I was asked to document all my tribal knowledge into a computer. It was a daunting task, but it made sense that I needed to document and process flow how we maintained all the rides. It was an educational process that at the end made it easier to get the job done, even though I felt replaced by a computer.

*Research Question #2: What are the perceived factors that impact or influence this transfer and applicability of knowledge?*

*Research Question #2- Themes for the Operations Group*

- All 5 participants felt that even though there was not a need to transfer technical knowledge, that there was a desire to transfer knowledge gained from their years with the company in the form of stories regarding the heritage and traditions of the company, such as stories about their interactions with the founder of the company. They felt that the new generations were not as committed to the traditions and stories of the company and that they could have benefited from hearing their experiences. They all expressed a lot of passion and commitment for the company, and were disappointed that they were not asked to share any of these experiences with others. This lack of interest in their experiences made them feel not valued. One participant shared,

I belong to the retiree club and we are the holders and creators of the traditions of the theme park. Kids now a day's don't have the same connection to the Park as we do, they don't seek our input, and they don't want to hear our stories. The company should do something to maintain the traditions; we are still here and want to help.

- All 5 participants felt that the nature of the 24-hour operation and fast service type environment did not allow for deeper conversations with their managers. Managers work different shifts, covering Park hours and also night shifts to get the Park ready for the next day, so they were too busy dealing with the day to day operation that they did not have time for conversations about retirement plans. All 5 participants worked their regular scheduled shifts until their last

day. There was no time set aside for knowledge transfer. One participant shared, “My manager had planned a retirement party for me, but no one attended because the Park was busy and everyone had to work, my manager didn’t even attend.”

*Research Question #2- Themes for the Professional Services Group*

- Three of the participants felt that it was because of their own initiative and commitment to the company that some knowledge transfer took place before they left. They wanted to make sure that the company did not suffer because of their departure. They wanted to be remembered in good terms and felt this initiative would help them maintain a good relationship with their bosses. One participant shared, “When I knew I was leaving, I started entering comments in the system after every transaction to make sure the next person handling these requests had the background for it”.
- For the 3 participants who did not take the initiative to transfer their knowledge before leaving, they said it was because their work must not have been valued, since no one asked them to transfer their knowledge. A common belief was that perhaps the organization saw their departure as an opportunity to hire people with new ideas and perhaps do things differently. One participant stated, “I felt hurt, they started taking things off my plate in the last two weeks, they didn’t even ask if would meet with them afterwards or to help them answer questions. I was the only doing my job, so I guess they wanted to do things differently”.
- All 6 participants felt that they walked away with valuable knowledge from

theme parks. They believed that their bosses did not know exactly how much knowledge they had and were unaware of all the details of their work. One participant shared,

I have so much of the company's knowledge; I don't think they realize all the secrets that I know. I remember during my last weeks, they didn't know what questions to ask me, but I did get one call 3 months later. There was a mystery they needed to clear and somehow they knew that I would know the answer.

*Research Question #3: What can the Human Resources Department do to assist a theme park to better leverage the knowledge base of its retirement workforce?*

*Research Question #3- Themes for the Operations Group*

- All 5 participants would have liked an opportunity to talk to someone about their experience with the company prior to leaving and to find out about their options to share their knowledge during their last few months or even after leaving the company. All participants want to maintain their connection with the company and do so by joining the retiree club. They believe that HR could help by making sure the leaders of the company realize that there is a wealth of knowledge in this club and that it is not too late for the company to leverage and tap into this group's knowledge base. One participant said,  
  
I want to help the company and I want to volunteer, but no one thinks of us as thought partners for the company, no one asks for our help. There seems to be a lack of interest in our retiree club and there are 1,200 of us.
- All 5 participants interviewed are currently working part time, 3 of them have up to three jobs. All are employed with other companies that focus on providing customer service. They would have liked to know what their options were to remain employed with theme parks on a part time basis. Some thought about asking, but did not want their pension benefits to be negatively

impacted. They believe that this is an area in which HR could have made a difference, had they been educated on this process. One participant stated,

I would have stayed with theme parks but no one told me I could work part time. I wish I had had someone to talk to about the retirement process and discuss my options. It would have been great if HR had a session to educate me on this process and what to expect after retirement.

### *Research Question #3- Themes for the Professional Services Group*

- All 6 participants expressed their desire to have had an exit interview conducted by HR to share their off-boarding experience and have someone to ask questions about the retirement process and get educated on pension benefits. One participant shared, “I never had an exit interview; I thought I would have the opportunity to talk to HR about my experience and ask questions, that would have helped me a lot”.

### **Themes for Human Resources Participants**

*Research Question #1: To what extent, based on the perception of those who have retired, does a theme park leverage the knowledge base of its employees before they leave the company?*

- All 8 participants shared that there are no to minimal processes in place to leverage the knowledge base of the retirement workforce before they leave the company. Four participants referenced succession plans for key roles as an attempt to prepare for retirement risks, however, the focus is on identifying and preparing the new incumbent with no to very little participation from the person retiring and vacating the position. Only 2 participants mentioned they had seen job shadowing for very high-level executive roles as an attempt to help with knowledge transfer. One participant stated, “Once someone



announces that they are retiring, the manager is focused on identifying the person to take the position and what changes they can make, there is no focus on capturing historical data”.

*Research Question #2: What are the perceived factors that impact or influence this transfer and applicability of knowledge?*

- Six participants shared that a perceived factor that prevents this knowledge transfer from those retiring is that some leaders want new knowledge and see this as an opportunity to do things differently. Because theme park employees tend to have long tenure, the perception is that some processes have been in place and performed without change for a long time and could benefit from a new perspective. One participant stated,

Our employees have long tenure, and our processes are antiquated. Leadership wants new knowledge, not the old stuff. The new generation is not interested in how we used to do things; they are interested in how we can make things better.

- Seven participants shared that another factor that prevents this knowledge transfer is due to retirees not providing enough notice, limiting the time needed to put a knowledge transfer process in place. The perception is that retirees are afraid of giving too much notice for fear of being treated differently. A factor that influences this perception is that many of the leaders are from younger generations, so those from older generations feel less valued and with fewer opportunities as they have seen the younger employees advance at a much rapid pace. These leaders to employee relationships between generations create perceptions that damage trust and result in older employees feeling antiquated and not wanted. One participant shared,

I have spoken to someone who was planning his retirement 6 months in advance but didn't want to announce it for fear of being let go sooner than planned or feeling pushed out, so he decided to wait before making the announcement.

- Five participants shared that another challenge to knowledge transfer is that the theme park culture is one that is not open to having discussions about retirement. Leaders are not equipped and do not know how to approach this topic with their employees who are eligible for retirement, instead they wait for the retiree to announce their departure. One participant commented,

The leadership team is much younger than the workforce population and they don't know how to approach the topic of retirement. Our culture is not one that openly talks about this, leaders are afraid of saying the wrong thing and offending people.

*Research Question #3: What can the Human Resources Department do to assist a theme park to better leverage the knowledge base of its retirement workforce?*

- Five participants share that HR plays a key role in changing the theme park culture to one that is more open, collaborative and sensitive to the retirement process. HR needs to educate leaders on how to approach the topic of retirement and ensure those retiring feel valued. One participant said, "It should be our job in HR to change the culture and actively identify the retirement workforce and develop processes to help managers and retirees through this process".
- HR should make the off-boarding process a priority and develop processes that will assist and enable leaders through the knowledge transfer phase. HR needs to better inform and educate retirees on the retirement and pension benefit processes. One participant shared,

Clients don't place value in the off boarding process, but it is our job to show them the value. There is an opportunity to educate ourselves on the retirement process first so that we can help those retiring.

- All 8 participants shared that there are benefits to having a knowledge transfer process in place. Benefits include having insights into how things have been done in the past, critical for theme parks since they rely heavily on the history and traditions of the company. Another benefit is allowing for the opportunity to enhance, rather than reinvent the wheel. The productivity and engagement of the retirement workforce would increase if they felt valued and were seen as contributing members until their last day. If they felt valued, they would perhaps share their retirement plans with the company sooner than later. One participant shared,

Imagine if we had an off-boarding process in place, retirees would feel that they were leaving a legacy and that the company honored their knowledge and experience. What an amazing way to ensure our employees remain loyal to our company after they leave.

- All 8 participants identified potential risks when developing and implementing knowledge transfer processes. Two possible risks that were mentioned include that people could feel targeted or discriminated against because of their age, and the perception that the company is trying to get rid of older employees. Both could result in resistance and push back to sharing their knowledge with others. One participant said, "For this to work, it has to be done with full disclosure and it must be purposeful so that those retiring don't feel targeted and instead see this as something positive. It all depends on how it is rolled out".
- All 8 participants shared that time is the biggest challenge they would have to

overcome when implementing a knowledge transfer process. Theme park employees are known for working long hours and operating lean, so there is a lack of time and this could be perceived as taking time away from the operation. Another factor, which was mentioned by 6 participants, is how to approach knowledge transfer from retirees when the retirement is forced, such as during workforce reductions and layoffs. When this occurs, there is no time to transition and feelings are hurt. HR needs to consider if there are steps that can be taken proactively, before the separations. One participant shared,

We need to get better at transferring knowledge before layoffs. I have seen us do the same things over and over again, so instead of building on what we have, we always start over. We failed to have processes in place to document people’s work. All of this, results in time wasted.

**Summary**

The table below summarizes the key themes that surfaced as a result of this study.

Table 6 - *Themes of the Study*

Theme	Participant Quotes
<p>There are no formal company efforts in place at theme parks to leverage the knowledge from those retiring. However, some salaried employees have taken the initiative to document or share their knowledge with others before leaving the company.</p>	<ul style="list-style-type: none"> <li>• <i>“I felt awkward, I had spent 21 years with the company and no asked me to share any of my knowledge, no download, no questions asked, no calls afterwards either”.</i></li> <li>- <i>“I felt hurt, they started taking things off my plate in the last two weeks, they didn’t even ask if would meet with them afterwards or to help them answer questions. I was the only doing my job, so I guess they wanted to do things differently”.</i></li> <li>- <i>“Once someone announces that they are retiring, the manager is focused on identifying the person to take the position and what changes they can make, there is no focus on capturing historical data”.</i></li> <li>• <i>“The company didn’t know what I knew and I wanted to leave on a good note, so I started documenting my work, my key contacts and took the initiative to update my manager on my work”.</i></li> </ul>

(continued)

Theme	Participant Quotes
	<ul style="list-style-type: none"> <li>- <i>“When I knew I was leaving, I started entering comments in the system after every transaction to make sure the next person handling these requests had the background for it”.</i></li> <li>- <i>“I have so much of the company’s knowledge; I don’t think they realize all the secrets that I know. I remember during my last weeks, they didn’t know what questions to ask me, but I did get one call 3 months later. There was a mystery they needed to clear and somehow they knew that I would know the answer”.</i></li> <li>• <i>“We need to get better at transferring knowledge before layoffs. I have seen us do the same things over and over again, so instead of building on what we have, we always start over. We failed to have processes in place to document people’s work. All of this, results in time wasted”.</i></li> </ul>
<p>There is no need to capture the technical knowledge of those retiring from Operations; however, there are opportunities to capture the stories and experiences from those retiring.</p>	<ul style="list-style-type: none"> <li>- <i>“There were so many people who could do my job; we were training people almost every day because of the high turnover in Operations. There was no need for me to teach anyone what I was doing”.</i></li> <li>- <i>“I belong to the retiree club and we are the holders and creators of the traditions of the theme park. Kids now a day’s don’t have the same connection to the Park as we do, they don’t seek our input, and they don’t want to hear our stories. The company should do something to maintain the traditions; we are still here and want to help”.</i></li> </ul>
<p>Knowledge transfer is evident in the organization during the on-boarding of a new employee and during expansion efforts, such as during the opening of a new theme park.</p>	<ul style="list-style-type: none"> <li>- <i>“We were so good at training new cast members, they go through training at the university first, then they get an overview of our area and then they receive 3 days of on-the-job training. We spent a lot of time making sure they knew how to perform their jobs. But what about when we leave, no one took the time to help me with the exit process”.</i></li> <li>- <i>“To prepare for the expansion and opening of the new theme park, I was asked to document all my tribal knowledge into a computer. It was a daunting task, but it made sense that I needed to document and process flow how we maintained all the rides. It was an educational process that at the end made it easier to get the job done, even though I felt replaced by a computer”.</i></li> </ul>

(continued)

Theme	Participant Quotes
<p>Some factors that enable knowledge transfer are employee passion and commitment for the company. It is not too late for theme parks to leverage the knowledge from those who have retired; retirees want to share their knowledge with others. There is a strong desire to preserve the traditions and heritage of the company.</p>	<ul style="list-style-type: none"> <li>- <i>“I want to help the company and I want to volunteer, but no one thinks of us as thought partners for the company, no one asks for our help. There seems to be a lack of interest in our retiree club and there are 1200 of us”.</i></li> <li>- <i>“I belong to the retiree club and we are the holders and creators of the traditions of the theme park. Kids now a day’s don’t have the same connection to the Park as we do, they don’t seek our input, and they don’t want to hear our stories. The company should do something to maintain the traditions; we are still here and want to help”.</i></li> <li>- <i>“Imagine if we had an off boarding process, retirees would feel that they were leaving a legacy and that the company honored their knowledge and experience. What an amazing way to ensure our employees remain loyal to our company after they leave”.</i></li> </ul>
<p>Some factors that prevent knowledge transfer from occurring include time, the perception that young leaders want new knowledge and don’t see the work of older workers as valuable, and a culture that is not open to talking about retirement as a normal part of the employee life cycle.</p>	<ul style="list-style-type: none"> <li>- <i>“My manager had planned a retirement party for me, but no one attended because the Park was busy and everyone had to work, my manager didn’t even go”</i></li> <li>- <i>“Our employees have long tenure, and our processes are antiquated. Leadership wants new knowledge, not the old stuff. The new generation is not interested in how we used to do things; they are interested in how we can make things better”.</i></li> <li>- <i>“I have spoken to someone who was planning his retirement 6 months in advance but didn’t want to announce it for fear of being let go sooner than planned or feeling pushed out, so he decided to wait before making the announcement”.</i></li> <li>- <i>“The leadership team is much younger than the workforce population and they don’t know how to approach the topic of retirement. Our culture is not one that openly talks about this, leaders are afraid of saying the wrong thing and offending people”.</i></li> <li>- <i>“For this to work, it has to be done with full disclosure and it must be purposeful so that those retiring don’t feel targeted and instead see this as something positive. It all depends on how it is rolled out”.</i></li> </ul>
<p>HR can play a key role in enabling a knowledge sharing organization. To do this HR must prepare the culture to be open to</p>	<ul style="list-style-type: none"> <li>- <i>“I would have stayed with theme parks but no one told me I could work part time. I wish I had had someone to talk to about the retirement process and discuss my options. It would have been great if HR had a session to educate me on this process and what to expect after</i></li> </ul>

(continued)

Theme	Participant Quotes
knowledge transfer, educate managers and retirees on their roles in the knowledge transfer process, the off-boarding of a retiree and what options are available after retirement.	<ul style="list-style-type: none"> <li>- <i>retirement”.</i></li> <li>- <i>“I never had an exit interview; I thought I would have the opportunity to talk to HR about my experience and ask questions; that would have helped me a lot”.</i></li> <li>- <i>“It should be our job in HR to change the culture and actively identify the retirement workforce and develop processes to help managers and retirees through this process”.</i></li> <li>- <i>“Clients don’t place value in the off boarding process, but it is our job in HR to show them the value. There is an opportunity to educate ourselves on the retirement process first so that we can help those retiring”.</i></li> </ul>

Although several themes surfaced, very little differences were found amongst the participant groups, whether they were a retiree or from HR. The results of the data revealed that there are none to minimal efforts in place in theme parks to leverage the knowledge base of the retirement workforce before they leave the company. All 19 participants, both from the retiree and HR groups agreed with this statement. The study also showed that knowledge transfer is evident in the organization in areas such as in the on-boarding of a new employee or during theme park expansion efforts. In these circumstances, the organization does a great job in educating the employees and in implementing processes that are successful and accepted. This data demonstrates that when knowledge transfer is made a priority and resources and time are invested, it works.

The data showed that there is one key factor that can help enable the transfer of knowledge from those retiring. A common theme found amongst the two retiree groups is that those approaching retirement have a strong desire to share their knowledge and experience with others. Whether the retiree is from the Operations or Professional Services area, there is a lot of commitment to preserve the traditions and heritage of the company and to ensure their team’s success after their departure.

Several themes also surfaced that could prevent the knowledge of transfer from those retiring if not managed appropriately. For the retiree groups, both Operations and Professional Services, the themes included lack of time by their managers, the perception is that they are too busy and do not have time for knowledge transfer. The second theme is the perception that their work is not valued and that there is a desire for new ideas and new ways of performing the job. For the HR group, the lack of time and the perception of retiree's work not being valued are consistent with the factors identified by the Operations groups. In addition to the factors above, HR identified a culture that is not open to talking about retirement as a normal part of the employee life cycle, to be a challenge as well. HR feels that for knowledge transfer to take place, the culture needs to change to one that is more open to this type of dialogue and educated and equipped on the importance and benefits of the retirement process.

The study also revealed that HR can play a key role in enabling a knowledge sharing organization, specifically as it relates to leveraging the knowledge base of the retirement workforce. The retiree groups, both Operations and Professional Services, would like HR to conduct exit interviews and provide education on the retirement process and pension benefits. Both groups shared that they would have benefited from having more information on this process as they left with several questions unanswered. The HR group took ownership and identified areas in which they could positively impact this important phase in an employee's lifecycle. They agreed with the retiree groups in that processes need to be developed so that both managers and employees are educated and well informed on their roles, resources and options during the retirement phase. They referred to this as an off-boarding process. HR believes that if an off-boarding process is



implemented and accepted it could be leveraged during voluntary and/or involuntary separations, allowing them time to consider the integrity and feelings of the person leaving. This process would allow theme parks to be proactive and better prepared to ensure that retirees leave with the same sense of pride and excitement as when they first joined the company. For knowledge transfer to take place however, HR knows that change management efforts must be in place to prepare the culture to embrace the retirement process and accept it as a critical and important phase in an employee's career.

## **Chapter 5: Conclusion and Recommendations**

### **Introduction**

The purpose of this study was to explore and understand to what extent the knowledge base of employees is leveraged in theme parks and explore the factors that prevent or promote this transfer of knowledge. This study looked specifically at the retirement workforce in theme parks as they represent a large number of employees who walk away with much of the company's knowledge. This study also looked at the role of Human Resources (HR) and explored the ways in which HR can help organizations leverage the knowledge base of its workers.

The results of this study provide theme parks with insights into resources and processes that can help them continue to grow and compete in today's challenging economy by focusing on accessing and utilizing the knowledge that is stored in the heads of their employees, especially those who are close to retirement. This chapter presents a summary of the research study, implications for professionals and retirees in theme parks, recommendations for future studies and my conclusion.

### **Summary of Research Study**

An interactive qualitative study was conducted with 19 participants, 11 retirees and 8 Human Resources professionals, all from theme parks, in order to explore and address the following research questions:

- To what extent, based on the perception of those who have retired, does a theme park leverage the knowledge base of its employees before they leave the company?
- What are the perceived factors that impact or influence this transfer and

applicability of knowledge?

- What can the Human Resources Department do to assist a theme park to better leverage the knowledge base of its retirement workforce?

During the interviews, notes were captured and themes were pulled for each of the research questions and for each of the groups being studied, retirees from Operations and Professional Services, and HR professionals. The results of the study revealed that in theme parks there are minimal efforts in place to leverage the knowledge base of the retirement workforce before they leave the company; however, the study also revealed that there are several areas in which HR can have a key role in enabling knowledge transfer and creating a more collaborative and learning culture.

### **Implications for professional practice**

The data results point to several implications for professionals and retirees in theme parks and HR. As stated earlier on Chapter 1, according to the Society for Human Resource Management (SHRM, 2006) few companies have begun to focus on knowledge transfer from older to younger workers. However, due to the economic downturn, many Baby Boomers will remain in the workforce longer than planned. Therefore, the time is critical for organizations to act now. In order for organizations to remain competitive, organizations must learn a way to leverage their biggest asset, their people.

### **Implications for Theme Parks**

The data results showed that knowledge transfer is evident in theme parks when they are undergoing major expansion efforts. The data also mentioned that theme parks are now seeing younger people take on more senior level roles. An HR participant of the study said, “Leadership wants new knowledge, not the old stuff. The new generation is

not interested in how we used to do things; they are interested in how we can make things better”. These data results coincide with statements made by DeLong, author of Lost Knowledge (2004). He said that the workforce is losing some key senior professionals, such as engineers and other professions that require years of training, faster than young engineers are joining in. DeLong (2006) said at a conference “Innovation and new growth, including global opportunities, will be stunted. You don’t start up new locations in Asia with junior people.” As theme parks continue to become more global and operate in countries outside of the United States, it is the most senior professionals that are being tapped and sent overseas to help open these theme parks. The concept of knowledge transfer and the ability to leverage the knowledge base of those close to retirement is something theme parks need to consider for their continued global success.

Other factors that make it necessary for theme parks to have knowledge transfer practices in place include the diversity of functions and roles required to run a theme park as well as their high turnover rates. As one retiree from Operations stated, “There were so many people who could do my job; we were training people almost every day because of the high turnover in Operations”. These facts create an even greater need to have knowledge management practices in place to be able to leverage the knowledge of its employees, especially of those who have mastered their roles and are ready for retirement. The results of the study revealed that theme parks have done a great job at creating standard operating guides for the operations roles, however little efforts have been made to capture the knowledge from those on the Professional Services side as well as the stories and implicit knowledge from those retiring. One Operations participant shared, “I belong to the retiree club and we are the holders and creators of the traditions

of the theme park. Kids now a day's don't have the same connection to the Park as we do, they don't seek our input, and they don't want to hear our stories. The company should do something to maintain the traditions; we are still here and want to help". The great news for theme parks is that people are eager to share their knowledge with others, if given the opportunity.

Having been part of the theme park industry for the last 21 years and after conducting this study, I agree with Anton-Clavé, who said that theme parks continue to face the same operational challenges from decades ago, that of managing, developing and retaining their staff to deliver quality customer service along with the development of strategies and offerings that will result in increased visits by their guests (2007). The time is now for theme parks to take action and develop processes that will allow them to leverage the knowledge base of their retirement workforce.

### **Implications for HR**

The study conducted is also significant for the HR profession. HR has a responsibility for helping organizations acquire the right talent; place people in the right roles and in fostering organizations that empower people to use their knowledge and talents to produce products and services that will help improve the bottom line. HR as a strategic partner can contribute to the bottom line.

One of the themes identified by the HR participants of the study is that of preparing and creating a culture that is open to knowledge management. One participant mentioned, "It should be our job in HR to change the culture and actively identify the retirement workforce and develop processes to help managers and retirees through this process". This belief is supported by research and literature as one of the key steps in

implementing successful knowledge management practices. According to Ahmed, Lim and Loh, organizations that support their knowledge management applications with cultural and structural change initiatives are much more likely to receive high return on investment (2002). A factor HR professionals will also need to consider before embarking on this task is the critical need to have strong leadership that understand the need for knowledge management and that are willing to invest in the right technology, the infrastructure to support this initiative and an organized way of achieving this (O'Dell & Grayson, 1998).

The study revealed that generational differences create perceptions that negatively impact the ability for knowledge transfer. The perception that surfaced from the study is that many of the leaders are from younger generations, so those from older generations feel less valued and with fewer opportunities as they have seen the younger employees advance at a much rapid pace. These leaders to employee relationships between generations create perceptions that damage trust and result in older employees feeling antiquated and not wanted. One HR participant shared, "I have spoken to someone who was planning his retirement 6 months in advance but didn't want to announce it for fear of being let go sooner than planned or feeling pushed out, so he decided to wait before making the announcement". These results around generational differences are consistent with what other organizations are experiencing based on other research conducted. According to Sujansky (2004), one way HR professionals can leverage generational diversity is by employing strategies that capitalize on similarities among generations. For example, many organizations find that younger generations value flexible work arrangements while at the same time, such arrangements provide mature workers with

more opportunities to continue working. The results of my study revealed that retirees want to work part time and could benefit from flexible work schedules. Some of the participants considered asking for part time opportunities, but decided not to, for fear of this impacting their pension benefits. They believe that this is an area in which HR could have made a difference, had they been educated on this process. One participant stated, “I would have stayed with theme parks but no one told me I could work part time. I wish I had had someone to talk to about the retirement process and discuss my options. It would have been great if HR had a session to educate me on this process and what to expect after retirement”.

Another finding around generational differences is that managers are afraid to discuss the topic of retirement for fear of saying the wrong thing and offending someone. One HR participant commented, “The leadership team is much younger than the workforce population and they don’t know how to approach the topic of retirement. Our culture is not one that openly talks about this, leaders are afraid of saying the wrong thing and offending people”. HR will need to educate their managers on how to approach this topic so that older workers do not feel targeted or discriminated against because of their age. Ageism in the workplace brings some challenges to the organization that HR will need to monitor and address. One of those challenges is stereotypes about older generations and assumptions that could be made because of these stereotypes, which could lead to discriminatory comments or practices. HR will need to take into account the impact knowledge management has on the older generations. It will be critical for HR to choose a language and approach that makes older employees feel valued, cared for and seen as contributing members of the organization.

HR can also help organizations ensure that baby boomers are motivated to mentor or coach others to ensure their knowledge remains with the organization once they retire. The study showed a lack of feeling valued by the retired participants due to the lack of opportunities to share their knowledge. As one participant stated, “I felt awkward, I had spent 21 years with the company and no one asked me to share any of my knowledge, no download, no questions asked, no calls afterwards either”. According to Hastings (2008), the first step is to ensure that baby boomers are aware of the expectation that they need to transfer knowledge. This is something that should be seen as a compliment by the employee, a sign that the information they have gained throughout their careers is meaningful and that they can add value to the organization.

The aging of the workforce is expected to cause high levels of turnover, resulting in the loss of short- and long- term knowledge critical to organizational functioning. HR professionals will be confronted with the challenge of replacing skilled workers and developing new leaders. Yet, age-related turnover presents many opportunities to address key HR issues, including increasing employee engagement and diversity, transitioning to a performance-oriented culture, and aligning formal and informal organizational structures to further performance. The main link between negative or positive outcomes of age-related turnover is the loss of knowledge and experience, indicating that organizations that employ initiatives to capture and retain knowledge and experience of mature workers can minimize the negative impact of turnover.

Establishing communication, advice and knowledge networks and focusing on training that promotes organizational learning and knowledge transfer are two ways that HR professionals can address the issue of knowledge loss of mature workers (SHRM, 2006).



## **Implications for the Retirement Workforce**

The results of the study showed that the retirement workforce find themselves facing many challenges on their own. Not only the disappointment in feeling less valued as they approach their last months or weeks employed, but also the desire to remain connected to the organization once they have departed, a feeling they have after they have retired. One participant stated, “I want to help the company and I want to volunteer, but no one thinks of us as thought partners for the company, no one asks for our help. There seems to be a lack of interest in our retiree club and there are 1,200 of us”. Through this study I found the retirees of theme parks finding comfort and strength in each other and it is through this retiree club that they remain active and with a sense of still belonging to the organization. Another challenge they face is the need to continue to work. One participant stated, “I would have stayed with theme parks but no one told me I could work part time. I wish I had had someone to talk to about the retirement process and discuss my options. It would have been great if HR had a session to educate me on this process and what to expect after retirement”. These feelings of wanting to remain connected with the organization and the need to continue to have a source of income are challenges that surface after retirement. These findings align with a study conducted by MetLife Mature Market Institute in 2006 which found that mature workers are struggling to balance the conflicting pressures of income security, post-retirement-age employment and often age discrimination as they look for a sense of security and meaning in their retirement years. The study found that 78% of respondents age 55-59 are working or looking for work, as are 60% of 60 to 65 year olds and 37% of 66-70 year olds. Results showed that the working retired are drawn back to work looking for meaningful activity.

A study released by Monster Worldwide, Inc, in September of 2007 found that knowledge retention does not appear to be a high priority among organizations. Approximately 20% of respondents to the Monster survey reported that they were developing plans for knowledge and skills transfer from older workers. “While institutional knowledge is increasingly an organization’s most valuable asset, our study found that many companies do not have the process in place to preserve and redistribute this critical information,” said Jesse Harriott, vice president of research for Monster Worldwide (Leonard, 2008, p. 1). Until organizations are able to make knowledge transfer a priority, the retirement workforce will have to continue to face the challenges of feeling less valued as they approach retirement, the desire to remain connected to the organization after retirement, and the need to find a source of income and meaningful activities, on their own.

### **Recommendations for Further Studies**

Based on the study conducted, there are several areas that those interested in the topic of knowledge transfer and the retirement workforce should further explore.

First, since the results of my study and the results of the MetLife Mature Market Institute study (SHRM, 2006) found that mature workers are struggling to balance the conflicting pressures of income security and post-retirement-age employment, it would be interesting to explore best practices or actions that organizations can take to offer more flexible work arrangements and the impact of these on pension plans. It would also be interesting to study the benefits of keeping this population in the workplace longer than planned and how this impacts life after retirement if they are able to remain employed.

Second, results of the study revealed that one way for retirees to remain connected to the organization is through the retiree club, yet theme parks is not leveraging the knowledge base nor interest and commitment of this population of 1,200. A study should be conducted to identify ways in which retiree clubs could be leveraged for volunteer opportunities, knowledge transfer or consumer insights. In organizations where retiree clubs do not exist, what are some best practices to ensure retirees are still engaged with the organization? The baby boom generation is the largest demographic group in the United States, with nearly 80 million people. Projections show that nearly 25 million baby boomers will hit retirement age by 2013. By 2018, the numbers will continue to increase dramatically (Leonard, 2008). I believe that this population reflects the customers and visitors to theme parks and could provide insights into products and services that appeal to this population and serve as contributors to improving theme park's bottom line.

Third, while my study was specific to theme parks, it would be interesting to conduct a similar study in other areas of the entertainment industry, such as in mass media or other live entertainment venues to determine if the results of my study apply to other entertainment areas outside of theme parks. It would also be interesting to explore how the aging population is impacting these areas and how these very creative organizations are reacting to and solving for the impacts of the aging population.

## **Conclusion**

My interest in the topic of knowledge management and the retirement workforce has increased since conducting this study. Having heard the stories and experiences from 11 amazing theme park retirees and 8 HR professionals, I have been inspired to leverage

my HR profession to take action to make the experience of the retiree more meaningful and purposeful. However, this study has taught me that there are barriers to knowledge management that must be addressed by senior leadership and that it requires a culture of openness and acceptance to make the retirement process as best as can be.

The first research question I posed was to study the extent, based on the perception of those who have retired, that a theme park leverages the knowledge base of its employees before they leave the company. The results of the study revealed that for the most part, theme parks do not have a formal process in place to leverage the knowledge base of its employees before they leave the company. There is a strong desire by those retiring to share their knowledge with the company and in most cases, there is an expectation that their direct managers will request that this transfer of knowledge take place. However, the lack of interest and engagement by the manager often results in a disappointed retiree and a feeling of not being valued. This lack of interest by the manager also resulted in retirees coming up with their own conclusions as to why they are not being asked to transfer their knowledge. A common belief is that managers tend to be younger than those retiring; they are seeking younger employees with new and more modern ideas, and see their departure as an opportunity to do things differently. The good news is that retirees are eager to share their knowledge and experiences with others, so when theme parks get ready to leverage their knowledge, they will find a group of retirees willing to participate.

The second research question addressed the perceived factors that impact or influence this transfer and applicability of knowledge. The results showed that several factors make this transfer of knowledge more difficult. One of these factors is the nature

of the fast pace theme park environment. The participants believe that employees are too busy and managers do not have time to sit down and discuss opportunities to transfer knowledge. There are also factors that do enable knowledge transfer. One of these key factors is the retiree's pride, passion and commitment for the company and desire to share their knowledge with the goal of minimizing any disruptions to the operation. Because of this commitment, in the Professional Services side, several employees took the initiative to document their work and transfer their knowledge the best they could. In the Operations side, retirees felt that there was no need to transfer the technical knowledge, because these are well documented, and several people perform the same function. However, there is a desire to share some of their experiences and stories in order to ensure that the traditions of the company are passed down from generation to generation. I found optimism in the results, people want to share and feel valued and with the right processes in place this can be a win-win situation for both employees and the company.

The third research question addresses the role HR can play to assist theme parks to leverage the knowledge base of its retirement workforce. The results showed that HR can have a key role not just in the transfer of knowledge, but also in the entire retirement process as a whole.

First, HR can help develop an off-boarding process. Part of this off-boarding should include education for the manager and retiree about the retirement process. The manager needs to be comfortable having conversations about retirement. The retiree needs to be educated on the retirement process, on the pension plan and options for part time work after retirement. As part of this process, managers need to be educated on determining what type of knowledge transfer is needed and the best way to approach it.

Second, HR can develop processes to support the organization with knowledge transfer and consider the following questions:

- What is the best way to document technical knowledge? There is format and process that is working well in Operations, is this something that can be leveraged for the Professional Services side?
- What is the best way to document or transfer the less tangible knowledge or implicit knowledge, such as the stories and experiences that one gets from working in the theme park environment for a long period of time?
- What are other knowledge transfer processes that can be implemented? Options include mentoring, succession planning, job shadowing, etc.

Third, HR needs to develop, propose and implement a change management plan to change the culture to one that embraces and values retirement as part of the life cycle of an employee. Employees need to be educated on this important phase in everyone's life and the many ways in which they can participate. The goal of this plan should be to develop processes to allow the transfer of knowledge from those retiring, for retirees to feel valued and for employees to be comfortable talking about retirement and sharing their plans with the organization. A well thought out plan can make a difference in the organization and those approaching retirement; however, it is going to take commitment from senior leaders of the organization to invest the time and resources and make this a priority. To hear that HR can have a positive impact in the life of so many people while helping improve theme park's bottom line is exciting and a challenge I was glad to hear my colleague say, "It's our job to change the culture." Now is the time for organizations to take action and prevent this knowledge from walking out the door. In the words of the

famous Maori proverb-

“Ask me what is the most important thing

And I will reply

It is people,

It is people,

It is people.”

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## APPENDIX

### Questionnaire

#### **Interview questionnaire for those who have retired**

*Research Question #1: To what extent, based on the perception of those who have retired, does a theme park leverage the knowledge base of its employees before they leave the company?*

1. Once you announced that you were retiring, how would you describe the opportunity you had to share your knowledge with others?
2. Did the organization promote the sharing of knowledge? Can you give me some examples in which you observed knowledge sharing? Can you give me some examples in which you participated in knowledge sharing?
3. Did you see evidence of knowledge sharing among teammates? Can you give me some examples of how this knowledge sharing took place?
4. Did your managers demonstrate an interest in knowledge sharing? Can you give me some examples of when you observed this?

*Research Question #2: What are the perceived factors that impact or influence this transfer and applicability of knowledge?*

5. What obstacles or challenges did you observe when others were involved in knowledge sharing? Can you give me some examples?
6. What did you observe that enabled knowledge sharing with others? Can you give me some examples?
7. Did something motivate you to share your knowledge with others? What motivated you? Can you give me some examples of how this influenced

your behavior?

8. Did something prevent you from sharing your knowledge with others?

Can you give me some examples of this and how this influenced your behavior?

*Research Question #3: What can the Human Resources Department do to assist a theme park to better leverage the knowledge base of its retirement workforce?*

9. What would have motivated you to share your knowledge with others?

Describe how this would have motivated you. How would this have influenced your behavior? What would you have done differently if this had occurred?

10. What would have been your preferred method for sharing knowledge - e.g. face-to-face, email, intranet? Why? What are some examples?

11. Is there something HR could have done to assist you in sharing your knowledge with others? How would this have influenced your behavior? Can you give me some examples?

**Interview questionnaire for HR Business Partners:**

*Research Question #1: To what extent, based on the perception of those who have retired, does a theme park leverage the knowledge base of its employees before they leave the company?*

1. Does the organization promote the sharing of knowledge from those retiring? If so, can you give me some examples of what you have observed?
2. Are you aware of any best practices in the organization where this transfer

of knowledge takes place? Can you give me some examples?

3. Are you aware of any tools or processes being used in the organization to help with knowledge sharing? Can you give me some examples?

*Research Question #2: What are the perceived factors that impact or influence this transfer and applicability of knowledge?*

4. What obstacles or challenges have you observed in the organization in regards to knowledge sharing? Can you give me some examples?
5. What have you observed that helps or enables knowledge sharing in the organization? Can you give me some examples?
6. What are some things that you have observed that motivate employees to share their knowledge with others? How has this influenced employee behavior? Can you give me some examples?

*Research Question #3: What can the Human Resources Department do to assist a theme park to better leverage the knowledge base of its retirement workforce?*

7. Does HR currently have a role in promoting or enabling knowledge transfer from those retiring? If so, can you give me some examples?
8. What tools or processes do you think should be used to help with knowledge sharing? How would these tools or processes be used? Can you give me some examples?
9. What would the benefits to the organization be if there were dedicated resources to transfer the knowledge from those retiring to the remaining employees?
10. What are some potential risks the organization should consider if they



invest in resources to enable knowledge sharing? Why are these considered risks? How will these impact the organization?

11. What are some potential obstacles or challenges the organization may face if they invest in resources to enable knowledge sharing? How do these obstacles impact the organization? How should these obstacles be addressed?
12. What suggestions do you have to help transfer the knowledge from those close to retirement to the remaining workforce? Can you give me some examples?
13. If the organization is successful in implementing a process for knowledge sharing, where and how should this knowledge be stored or documented? Can you give me some examples?
14. If the organization is successful in implementing a process for knowledge sharing, what measures must be in place in order to ensure sustainment of this knowledge sharing process? Can you describe how these measures would be applied?