When Organizations Allow Expert Knowledge to Just Walk Away

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Please note: This transcript has been edited for clarity.

Turnover can be a devastating thing to some organizations, the loss of expertise and experience, if not transferred in some way to existing members, can disrupt the organization's ability to perform at the highest level over time. But unfortunately, one of the things that some organizations do less well than they should is capturing that knowledge so that it can withstand the loss of its best experts. There are a lot of people looking into this problem, but typically as a knowledge management or a human resources problem. Now, reflecting on several instances of this sort of brain drain happening, I am questioning whether this isn't some other type of problem entirely.

My name is Tom Galvin and these are my Reflections on Management.

Brain drain is a term that's quite often used when considering things like the people with strong intellectual capability leaving a country en masse and going off somewhere else because the opportunities are not there or the better opportunities lie elsewhere. You know, when we're talking about brain drain in this context, it's essentially associated with turnover, with people leaving an organization either because better opportunities lie elsewhere or they retire. And a lot of what I was thinking about in this is related to the latter.

I recall that in my doctoral program and also in in my past experience that there were a number of organizations who have been dealing with the issue of brain drain among some very, very long standing employees, long standing experts who have been with the company or with the organization for decades. They devoted their entire life to the organization. And then when it came time for them to retire, the concern about the loss of expertise was a very, very big part of the discourse about their leaving.

In some cases, if the expertise is really, really technical, they may be able to pass on the knowledge. But some of the things that really get hard to transfer are things like the professional judgment. I want to focus on that problem, but of two different varieties, because that traditional problem of the of the retirement and the loss of the long-standing expert, that's not the only kind of turnover problem that I've encountered. And I think that in some ways, the two problems, the two types of brain drain problems I'm going to talk about are ones that organizations don't seem to be very well suited to deal with for a couple of reasons. One, because efforts are trying to treat it like a knowledge management problem. Assume that if you can devote the effort to coding the knowledge, whatever that is, then you won't lose that knowledge. But unfortunately, there's there's lacking a culture of reuse. And then the other is that there are organizations that just do not have the

capacity or the will to want to retain all of the knowledge that's in the organization. In some ways, just simply let the knowledge walk. Now, this latter case I want to talk about first.

I'm going to give you an example of a case of a restaurant here not too far away from where I live. There has been this restaurant that has been a hit for years. It was a really, really great restaurant -- lunch, dinner, very high quality food. The place was always packed. They set up a tent in the back during the winter times had heaters going and the tables out there were full. I mean, this was a big place and they just still couldn't handle all of the customers inside the building, incredibly popular. And then the chef decided to take a position at a very high end prestigious restaurant. Congratulations to this individual. I mean, that was an absolutely tremendous opportunity. However, because of the way the whole restaurant business works or whatever, this individual had the intellectual property rights over the entire menu. And so when this new position came up and was accepted, the chef essentially took all the recipes away. The restaurant, in a rather short amount of time, decided to close rather than try to hire a new chef or try to rebuild its menu or whatever it was. It actually was kind of devastating for those of us who were occasional customers to that place and thought, man, what a great place. You know, this is this is the sort of place that the town needs to, you know, to revitalize its economy and to see it shut down was just kind of a shame.

So that's one of the cases in which I was kind of thinking about now. I'll ratchet it back to sort of like the more normal case, because usually these these sorts of intellectual property issues are not existential to the organization. But it does happen. I mean, it does happen quite a bit. And I know that certainly in academia writ large, there are plenty of times in which, you know, a highly popular professor with a very interesting and important curriculum, of course, because they own that knowledge when they depart, it is almost assumed that they take it with them.

And sometimes that knowledge cannot be in any way easily replicated because the academic community doesn't really think in terms of knowledge retention the way that other organizations might. So yeah, you sort of have have that issue where in essence, the challenge of the retention of knowledge is sort of the problem is largely pinned on the individual who's leaving, who may have particular incentives for not wanting to share that information or not, or basically allowing some portion of it to be retained. If they develop a develop a course or program, then they'll leave that behind for somebody else to take care of. But, yeah, once they leave, it kind of sort of goes with them.

But then there's this other problem. This is the one where I said before that the organizational culture itself is not attuned to wanting to retain knowledge. And this is a much more insidious one, because this leads to cases where the it seems like the organization forgets something for no reason other than convenience or inconvenience. I have a couple of examples. And they have a very, very similar similar kind of a storyline. One of them was in an academic setting and one of them was in an operational setting.

In both cases, the individual in question had a niche that that they had. They had this particular area of expertise, which was really it was related to the core mission of the organization. But it was unique. It was distinct and very much tied to that person's own expertise. The person comes in,

makes some really valuable contributions, tremendous contributions to the organization, changes the way it does business to at least some extent, does something that nobody else knows how to do and is and is really good at. Their job brings in contacts, network expertise from outside of the organization, either as consulting or advising or something of that regard, an area that the organization had not had perhaps wanted or thought it needed to be able to work in, but simply didn't have the ability to do so. And then, of course, time comes for that individual to depart the organization because the contract is up or retirement, whatever it was, didn't matter. It wasn't so much that the individual took that expertise with them, which they certainly did.

But the organization itself did not feel compelled to try to retain that knowledge in any way in the cases that I'm referring to. In essence, the organization decided that, OK, that individual's gone. We don't really need to worry about this anymore. And poof, it just was gone.

The context went away that there was no there was nothing put in place to try to retain any of the knowledge. And therefore, within a very, very short amount of time, it just basically was as if the individual hadn't been in the organization in the first place. And I'm not really overstating it. I mean, this is something that I've witnessed, again, more than once in multiple settings. And you just say to yourself, how could we allow this to happen? Because invariably the area of expertise that this unique individual came in with, it was something that perhaps was not required or essential to the organization's mission at the time in which the individual left. But lo and behold, a couple of years down the road, then indeed, that particular expertise, if retained, if remembered, could have been very, very useful to help the organization through some sort of a situation, crisis or some opportunity.

This is more of the organization's problem. And it's certainly understandable because when we consider the breadth of knowledge that a lot of organizations have to deal with breadth of subjects and the requisite depth that you have to go in, the organization just doesn't have enough people to cover all of these different possible areas of knowledge. We believe that, well, if we maintain networks and contacts and all of that sort of thing, we can we can recover that. We can go call. We know we could call this such and such person. They can we can find a way to research and recover the knowledge that we lost. We're very, very confident in our ability to do so.

Well, yeah, that's perhaps true. But there's there's a significant downside to that, and that assumes that the knowledge that you would be or the experts that you would be able to tap into have the same perspective as the organization which you talk about this from a knowledge management standpoint. Context matters, the knowledge to make it interesting, important, useful. However you judge the knowledge is very, very context dependent on the organization itself. There is a point where, yeah, you can probably call some experts somewhere, but you have to you have to educate that expert on the context of the organization, the situation that you're facing, what it is that you need this knowledge for. And they've got to translate it without the experience of being in the organization and to try to basically try to give you something that you can use. Whereas if there was a method of recall within the organization, a desire to retain that knowledge, then that whole step could be, you know, it's a matter of going back to the repository and pulling it up. That, of course, is easily said and not easily done.

And one of the things that I've been thinking about very hard the last few years is how do we avoid this problem? What could an organization do to try to encourage more of a of a climate of knowledge retention?

So let me talk about this climate of knowledge retention for a moment, because it is still ultimately, in part a knowledge management problem, because you have to have structures in place in order to allow the knowledge to be in some way captured, retained and available for reuse. And it is also a human resources problem because you are still always going to deal with the fact that you have fewer people than you have domains that you need to cover. The additional part of this, I think, is the lack of what constitutes that decision point of whether or not to keep or dispense knowledge of what is truly core needs to be held in the organization versus what it can just leave to outsourcing of some kind. So the challenge here is one of thoughtfulness and one of not so much the physical structure of the knowledge, but a deeper sense of what knowledge that the organization should take ownership of and which it consumes from elsewhere. This is more of a shared understanding kind of a perspective, because I don't think that organizations, by and large, have a firm handle of what they really think they should own as opposed to borrow from elsewhere.

Obviously, an organization is going to retain the knowledge closest to its core mission. It's really more on the periphery that it gets a little bit muddled because that's where the energy required to maintain the knowledge doesn't always seem to be worth the effort necessary to do so. The approach that I've come to take in this, whether I realized it or not, [is one that] I've used in several organizations that I have been in.

I want to call this the "grand narrative" approach. So the grand narrative or the meta-narrative is the story of how the organization produces and consumes knowledge from inside and outside. It is not just the story of why its core is what it is, but it's also a story about how it packages the core or what it considers to be reusable, retainable, et cetera. with a "story" approach. Then you're not really just thinking about knowledge in terms of bits and bytes that you store in the right folder and somebody can go to the right folder and yank it back out. But it is essentially tied to the broader narrative of the organization, more or less its history to connect how it uses its knowledge together. If you have this sense of history, then the members, especially those who have not been around for so long a time, have a better chance of being able to think about new situations and recognize the possibility that this is something that the organization has experienced in the past and can go go back and check the archives.

So it's not just a matter of physical structure. It's also an issue of organizational memory, of the organization's ability to remember what it has done in the past. So the way the actual approach that I've been taking is oral histories and monographs to capture discrete domains of knowledge and experience and then [overlay] the grand narrative which connects the different modules, the different oral histories and monographs together in a consistent knowledge repository, a consistent narrative that connects all of the disparate pieces together.

This is going to be demonstrated in a forthcoming reengineering of the Talking About Organizations Podcast website. For example, we know we have just completed 70 episodes and they

cover an incredibly wide breadth of information in dozens of different fields. But where's the underlying story that connects all of this together? What is it that that allowed or encouraged these schools to emerge or to fade? That's going to be built into the into the website so that listeners and those who wish to use the website as a resource can go through and see not just how where a particular episode fits, but where do these schools of thought come from and how do they connect together.And it will also inform some of the future episodes we undertake.

In a similar fashion [I will do this in] my current institution. The thing that I've been trying to do is to move away from knowledge retention as a database and do it as a series of monographs or books that sort of capture the state of knowledge at a given time for something which is not [necessarily] currently in use, and instead capture it in a way that it would be easy to, from a topical standpoint, easy to go back and say, all right, we used to do this or we used to teach this or we used to work this lets us sort of pull it on the off the shelf, see what was done and update or whatever. If in the future we need to revitalize it. I found the monograph to be far more effective because it doesn't just contain the knowledge as understood. It also sort of forces us to go back to the origins of the knowledge, how do they come into the organization in the first place. And it also kind of puts things a little bit more in story form, which I think is in a lot of ways much more effective. It sort of puts the qualitative aspect of the knowledge on top of the quantitative or the existence of it as the monograph answers the why the why this was considered important.

It also can still be a tickler, almost like a Wikipedia of sorts, to try to help newer members go back and understand from where the organization came if the organization is not keeping this sort of a history as a repository. So I'd like to say is I invite you to kind of monitor what's going to be going on in the Talking About Organizations Podcast website as sort of a demonstration of what I'm talking about here with the grand narrative approach. You're going to start seeing this in a couple of months, and it's going to be one of those things where we take the different pockets of knowledge and package it together so that we can folks can see connections, see where the gaps and inconsistencies or new ideas emerge, which we think will be really helpful for you as listeners who are really interested in organization theory and management science. And then hopefully, if this makes sense to you, then perhaps the grand narrative approach could be a way of going back into your own organizations and thinking about how do I reuse or recapture the great stories of how the organization uses its knowledge so that it can be brought back to life at a future time when it may very well be vital to a situation that an organization is facing.

… And that's all for now. The views expressed are my own and do not necessary reflect the United States Army War College, the United States Army or the Department of Defense. Thank you for listening and have a great day.

All the Best!
Tom Galvin