

## MANAGING PEOPLE

# The Right Way to Off-Board

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## LEADERSHIP & MANAGING PEOPLE HBR ARTICLE

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When a [valuable employee tells you she's leaving](#), worrying about losing her institutional knowledge and experience is understandable. How can you oversee the transition in a way that helps you retain that expertise? Who should be involved? How far in advance of the employee's end date do you need to start? And how do you motivate the departing colleague to cooperate?

### What the Experts Say

In many organizations, the typical off-boarding process is a whirlwind of project wrap-ups, paperwork, and exit interviews. “The manager might ask the person who's leaving to write a [report] to share his knowledge, but often there's just not enough time for that,” says John Sullivan, professor of management at San Francisco State University, HR expert, and author of *1000 Ways to Recruit Top Talent*. But failing to capture the departing employee's organizational-specific knowhow is shortsighted— especially if the person leaving has “[deep smarts](#)” — meaning business critical, experienced-based” knowledge, says Dorothy Leonard, professor emerita at Harvard Business School and chief adviser of the consulting firm [Leonard-Barton Group](#). “These are the people who have so much tribal knowledge and are so valuable that they become almost irreplaceable,” she says. Fortunately, a lot of this know-how can be passed along if you make it a priority. “You're not going to be able to clone the employee, but you can identify her behaviors, thought patterns, and processes that have made her such a valuable decision-maker.” Here's how:

### Make a plan

Your first step is to lay out how you will transfer the knowledge, who you will transfer the knowledge to, and along what timeline. If you have a say in the matter, ask the departing employee to give you a couple of months' notice. Doing so gives you time to identify and [hire a qualified replacement](#) — whether that person is [an internal candidate](#) or an external one. That may not be possible, but buy as much time as you can. Then you and the employee must work together to figure out the scope of information that needs to be transferred. “Ask, ‘How much of this [expert's] knowledge has never been captured or documented?’” suggests Leonard. This

information will help you come up with learning plans for your team and the individual's successor. Bear in mind that the "more unarticulated the knowledge, the more time you'll need to pass it along."

### **Motivate the expert**

The next step in the process is to [encourage the person who's leaving to share](#) his knowledge. "If the employee is really unhappy with the organization," this could be a challenge, Leonard acknowledges. In fact, "it may be well-nigh impossible" to convince him to cooperate. "But if he's just somewhat reluctant, you need to find out why." It could be that he's humble or unaware of his expertise. "He thinks, 'That's just the way I do things.'" Or perhaps he doesn't know how to teach others what he knows. In these cases, it's your job to help him "transfer knowledge in a structured way," she says.

### **Create apprenticeships**

If you have months for a transition, Leonard suggests creating a "carefully constructed action plan of learning," whereby the "highly skilled, deep smarts employee is paired with one or more replacements" so they can observe her in action, learn and practice new skills, and receive feedback on their performance. Consider it "an accelerated apprenticeship." The learner might sit in on a conference call to hear how the expert pitches clients or attend a meeting to observe her soliciting input from colleagues in another department. After a period of shadowing, give successors a series of "[mini-experiences](#)" so they can try doing the tasks on their own. "We don't learn deeply by checklists or lectures," Leonard says. "We learn by doing."

### **Emphasize team learning**

If you're really short on time and you don't have an identified successor, Leonard recommends holding a meeting in which the departing employee "[shares stories with colleagues](#) about how he handled problems and crises" that arose during his tenure. This "exploratory question and answer" session should be conducted by a "skilled facilitator." The goal, she says, is to reveal insights into the expert's thought process and help team members absorb information. Questions such as "Who did you consult before you made this decision? And what alternatives did you consider?" should be encouraged. "You want to go through these [scenarios] in a structured way and in enough detail so that a pattern emerges." The most effective [knowledge transfer involves conversation](#). Sullivan recommends also asking the expert how he learned what he knows. "Ask what he reads, which websites he visits, and whom he talks to," he says. The goal is to "speed up the learning" of the remaining team members. "The world changes so quickly, what matters is how you learn new stuff."

### **Document selectively**

Sullivan is skeptical of off-boarding processes that require the departing employee to compose a hefty "here's-how-to-do-my-job manual." Too often, he says, "the person doesn't bother to write it up, and even when he does, no one ever reads it." Selective recordkeeping can be helpful, however. Leonard recommends that apprentices and team members trying to capture the expert's knowledge keep "learning logs" of information that, in some cases, can later be "entered into a database."

### **Focus on the relationship**

The best way to retain the expertise of a departing star employee is to maintain a relationship with her. You might go to her with the occasional question, engage her as a consultant or hire her back someday. So set the right tone during the off-boarding process, says Sullivan. Even if you don't work together again, she still serves as a brand ambassador who could refer business or job candidates, he says. "Don't accuse people of disloyalty for leaving," he says. "Let them know you love them and that you want to keep in touch. It's not an exit, it's the beginning of the next phase," he says. Leonard concurs: "People who are leaving a company want to feel good about [the place they're leaving]."

### **Be prepared for the next time**

The off-boarding process goes much more smoothly if you already have [tools and systems](#) in place to ensure that knowledge is constantly being transferred from experts to successors. That way, "if the proverbial bus were to run over the employee," you're not left in the lurch, says Leonard. For example, says Sullivan, the kind of concentrated job shadowing discussed above doesn't need to be reserved for off-boarding purposes. As the manager, you should always create opportunities for less-seasoned colleagues to work side-by-side with your resident experts, he says. The objective for the less-experienced staff member is to learn how his senior colleague gets things done; the goal for the expert is to "mentor, which is part of leadership development," he says. Of course, some experts are disinclined to "teach others how to do their jobs because they want to be seen as irreplaceable." But you can't afford to have an employee with a monopoly on company-specific knowledge. To prevent this, training and coaching should be part of the promotion process or an incentive for [phased retirement](#). "They should need to prove that they've trained their backfill," he says.

### **Principles to Remember**

#### **Do:**

- Create opportunities for less-experienced colleagues to observe the expert in action
- Encourage team members to keep a log of what they've learned from the expert and, more importantly, to practice new skills and behaviors
- Make training and coaching part of the promotion process in order to motivate experts to mentor possible successors before they leave

#### **Don't:**

- Panic— determine the timeframe and the scope of the knowledge that needs

- transferring to figure out which strategies will work best for your team
- Bother asking the departing expert to write a lengthy how-to manual — instead, ask him to share stories of how he handled problems in the past
  - Treat the person like a traitor for leaving the organization — use the off-boarding process to demonstrate your respect

### **Case Study #1: Determine a workable timeframe and be flexible**

Julie Lavender, director of personnel relations and employee policies at Ford, admits that she was rattled when Maria, one of her high performers who had worked at the automaker for close to 30 years, announced her plans to retire.

“There was a moment of panic,” says Julie. “Maria had a complicated job. She worked on government contracts and compliance issues, and she was very good at digging into details. She also had relationships with a lot of key stakeholders. Losing that could be very difficult.”

With Julie’s approval, Maria applied for Ford’s phased retirement program, which allows prospective retirees to work part-time for six months at full-time pay. Her application was granted. “Whew. That took pressure off me because Maria’s primary responsibility during that time would be to onboard her replacement in a high-quality way,” says Julie.

Julie quickly identified Kelly as Maria’s successor. Maria opted to work three months full-time and then have three months off at full-time pay. But timing was a challenge. “Kelly was being promoted and her negotiations with the union took longer than we expected,” says Julie.

In light of the scheduling issues, Maria offered to take some of her time off earlier, so there would be more overlap with Kelly. “Maria was really flexible, and that helped make it a positive experience for everyone.”

Under Julie’s supervision, Kelly and Maria soon began working closely on a transition plan. Using Ford’s internal knowledge transfer tool, Maria created a reference for Kelly that detailed the access codes she would need, information on how to write reports, and the names and contact information of relevant internal and external colleagues.

“Maria also facilitated meetings with Kelly and each of the key stakeholders; this was a way to introduce her to the people and the issues,” says Julie. “Because of timing, Kelly never got to take the lead in the meetings with Maria in attendance, but that would’ve been ideal.”

Julie says that during the off-boarding process, her goal was to demonstrate “respect for Maria and all that she did for the organization,” and also support Kelly. “I wanted to show her that I had confidence in her.”

Maria's paid leave was up in December, and she recently delivered her laptop and company key cards at a department potluck. "She told us we could call anytime with questions."

### **Case Study #2: Lead storytelling sessions for colleagues and replacements**

Tamar Elkeles, chief people officer of Quixey, a technology company that helps users find information inside mobile apps, says she "hates the term 'off-boarding'" because it feels inadequate. "People are your number one asset, and the term off-boarding sounds almost derogatory," she says. "It should be more about helping people transition to their next stage — whether it's a new career, retirement, or something else altogether."

At her former job, she led the "transition process" for Bob (not his real name), who was leaving the company to start his own venture. Bob not only headed the company's marketing department, he was also the person who started the department from scratch, so everyone was worried about losing his expertise.

To help the marketing team get up to speed, Tamar held a series of focused "storytelling sessions" where she would "interview" Bob about a specific ad campaign or initiative that he had run in the past. "We had a tremendous amount of respect for Bob's work and wanted to celebrate him" as well as capture his knowledge, she explains. The sessions lasted 30 or 40 minutes each, and she held about a dozen per week over a two-month period, acting as the primary facilitator but also encouraging other employees to chime in with questions.

"I would ask questions like, 'Tell us about the messaging of this campaign. Why did you choose this collateral? How did you pick the colors of the logo? Why did you decide to use this agency?'" she says. "I wanted people to understand the thinking behind the decisions."

After each session, one employee was tasked with summing up the "essence of the story" in several paragraphs and sending it to the rest of the team in an email. These "stories" are also now shared with new hires during the onboarding process so that all employees benefit from Bob's experience and expertise, even though he's no longer with the company.

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