



Optimized Knowledge Transfer

WiBa 09



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IT Private Banking, Methodologies

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Agenda

Short presentation

- Onepager
- Prevent loss of knowledge
- Scenarios of highest potential
- Knowledge transfer methodology
- Customer resource estimate

Onepager - Moderated Knowledge Transfer Service

http://csintra.net/it_methodology_qualitymanagement/en/ktes_info_en.html

Scope

- Moderated service for key persons, leaving their working place:
 - Keep valuable tacit knowledge in organization
 - shorten induction time for new employee in key area
 - build up real deputies
 - loss of staff, assure ongoing high level results
- Support Line Management to enable high level results
- Create more transparency in working area:
 - Clarify roles and responsibilities
 - Support handover of 1 role to multiple persons
- Enable personal development and precise target setting
- Enable organizational development at working place
- Assure sustainable increase of organizational maturity on daily work level

Number of moderated transfers, key stakeholders

56 successfully realized and reviewed transfer projects in the following areas:

- IT Region Switzerland: KC, KI, KJ, KS
- Private Banking: SE, SH, SK, SO, SI
- Human Resources: RH
- Operational Excellence: RQ
- CFO: TG, TP
- Moderated knowledge transfer projects and titles: AVP, VP, DIR, MDIR, no title

Methodology



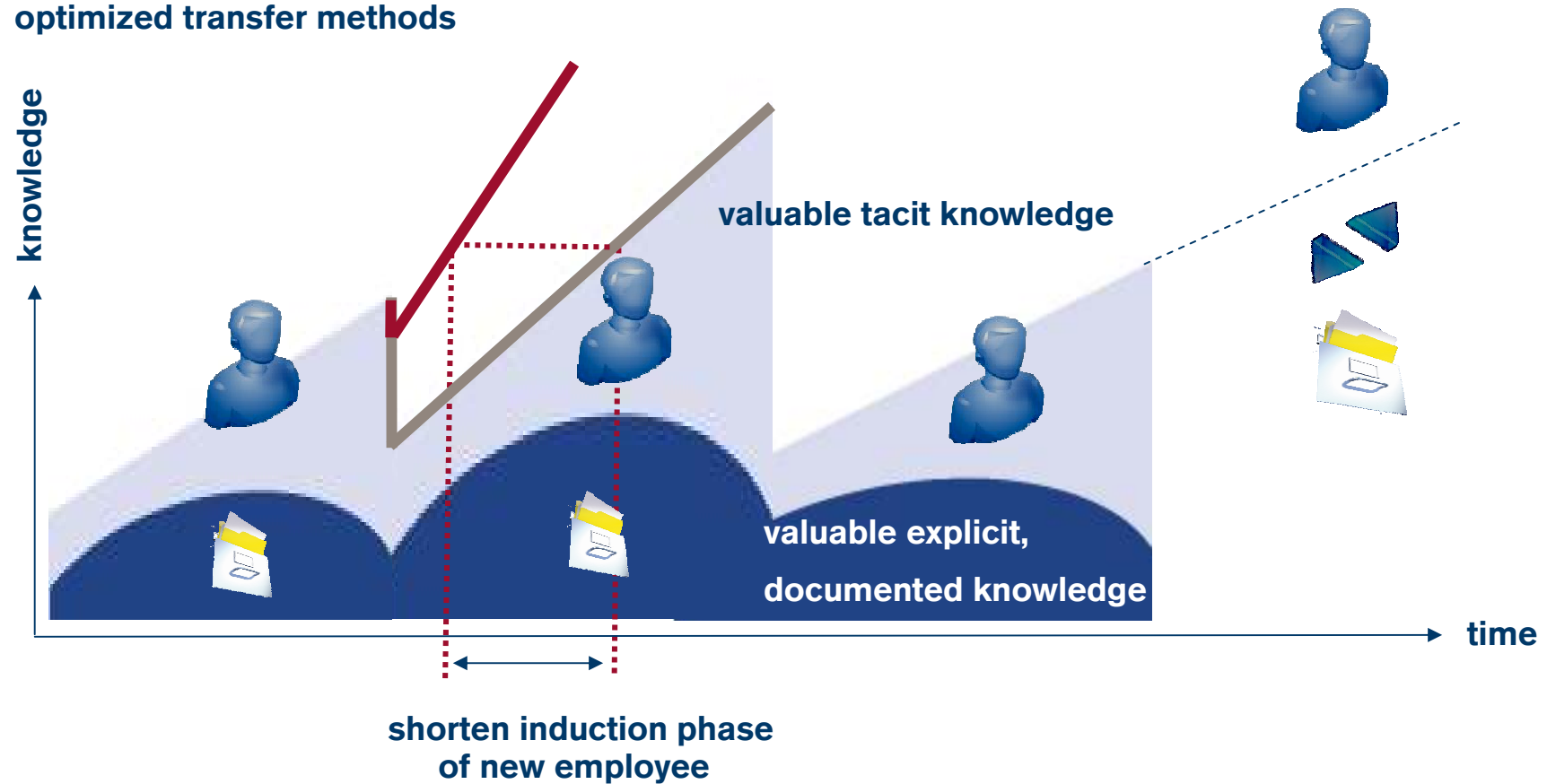
- For more details, contact: Benno Ackermann, knowledge.transfer@credit-suisse.com

Results

- Official rollout of moderated service since Sept. 08
- Transfer project is only started after an identified potential during Initialisation: ensure transfer success right at the begin / or no go decision
- Average reduction in induction time for successor per transfer project: 30% (based on evaluated customer feedbacks)
- Calculation of average org. savings per transfer project (based on IT PL cost rate – so far no rate card for AVP, VP, DIR, MDIR)
- Calculation of total cost savings through reduction in induction time
- Not included are cost savings due to time saved by Line Management during induction time of new employees: recent estimate of Line Manager IT PB - 15-20 PD per new employee

Optimized transfer: prevent loss of knowledge

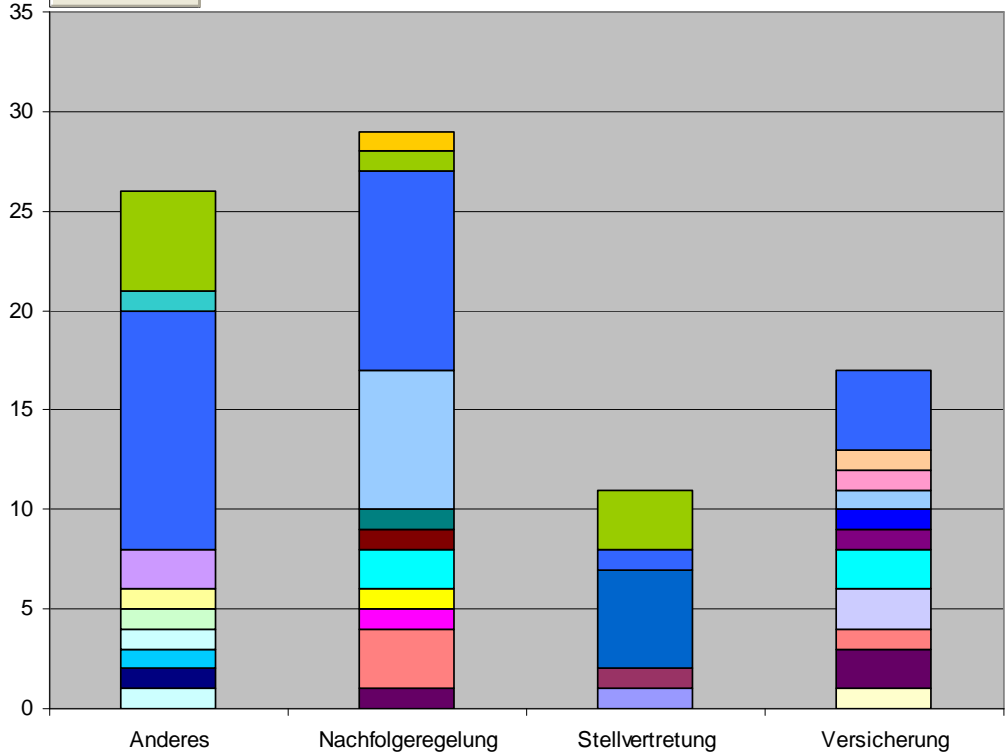
minimize organizational knowledge loss
predecessor – successor by using
optimized transfer methods



Scenarios of highest potential for CS

Unterthema (Alle) ▾

Anzahl von Nr.



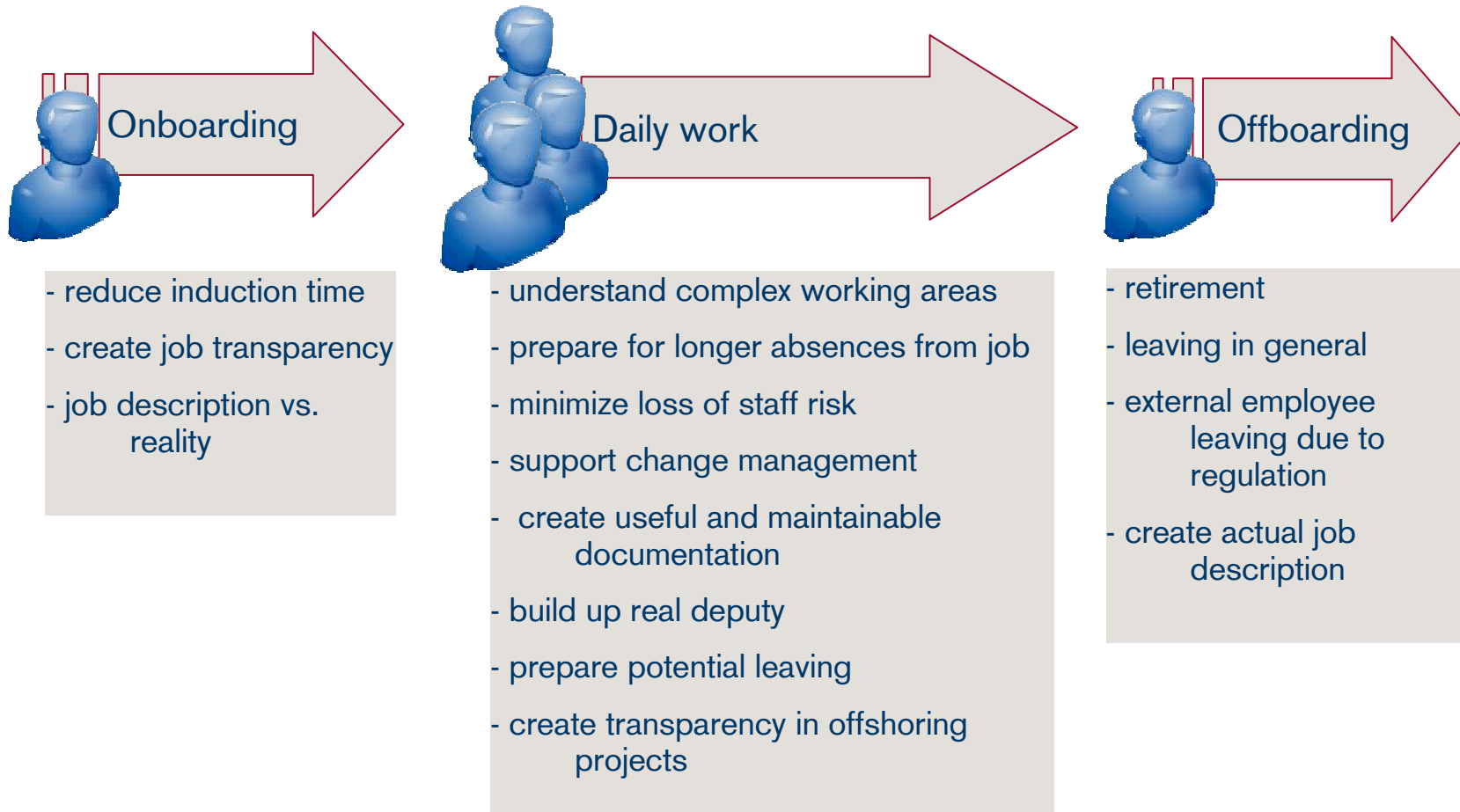
Kategorie ▾

- Thema ▾
- Mutterschaftsurlaubsurlaub
 - (Leer)
 - Wissenssicherung
 - Umstrukturierung
 - System Dokumentation
 - Standortbestimmung
 - Potentieller Abgang
 - Pensionierung
 - Pandemie Plan CH
 - Overload von MA
 - Offshoring
 - Neue Stelle
 - Nahtloser Aufbau CoE Polen
 - Nachfolgeregelung
 - Mutterschaftsurlaub
 - MA von diesem Fachgebiet schwierig zu finden
 - MA Abgang
 - Kündigung
 - Krankheit und Pensionierung
 - Konfliktfelder
 - Know How sichern
 - Keine Stellvertretung vorhanden
 - ExA Übergabe
 - ExA Abgang
 - cost reporting
 - BCM
 - Anstatt 1 Stv nun ganzes Team

Actual scenarios (Sept. 08) based on needs of participants (Line Managers IT Switzerland, HR Business Partners) in awareness trainings



Scenarios according to employee lifecycle



Knowledge transfer methodology for CS

- Moderated service for persons with key knowledge (internal or external employees)
- Transfer as much knowledge as needed
- Shorten induction phase for new employee
- Increase employee motivation: direct recognition of expertise



Practical example: retirement

Overview resource estimate during transfer period

- Resource estimate for retirement of manager / business leader
 - Phase 1 – knowledge mapping 2 x ½ day
 - Phase 2 – knowledge transfer 4 x ½ day
 - Phase 3 – transform implicit to explicit 1 x ½ day

Total for business leader 7 x ½ day (per role)

- Resource estimate for retirement of expert / RM
 - Phase 1 – knowledge mapping 1 x ½ day
 - Phase 2 – knowledge transfer 2 x ½ day
 - Phase 3 – transform implicit to explicit 1 x ½ day

Total for expert / RM 4 x ½ day (per role)

for more details: appendix

ROI

Business benefit

% optimization
for knowledge intensive processes

- save time = save money
shorten induction phase for successor + 30%
- support efficient change management process
(reorg, job rotation, fluctuation...) +30%
- prevent, minimize loss of knowledge, optimize
knowledge transfer from precursor to successor +20%
- minimize potential of project failure through
knowledge loss +20%
- increase employee motivation: direct recognition of
expertise +10%

Additional benefit

- take advantage of precursor's network +15-20%

Numbers based on VW coaching publications 2007
adapted estimates, CS senior management / HR

Kontakt

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Interesse an weiteren Details?

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Weitere Informationen zum Einsatz oder zur effizienten Anpassung in Ihrem Unternehmen?

Train the Trainer Kurse?

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www.wissenstransfer.ch

Workshops

- April 2009: 2h Mittagsveranstaltung, Company Center Zürich
- Juni 2009: ganztägiger Management Workshop am ikf, Luzern