

TSF Process – Handover of Know-How

A formalized and standardized process

- To deal with all the challenges linked to replacing the person in charge of an activity (changes in organization, retirement ...):
 - ensure business continuity
 - retain critical know-how within the organization
 - facilitate human transition
- Organized into three steps:
 - alignment: defining context and scope
 - mapping: describing the “territory” to be transferred
 - action plan: establishing the actions and the program of the transfer



EXP4 Consultant
Experience Management & Training

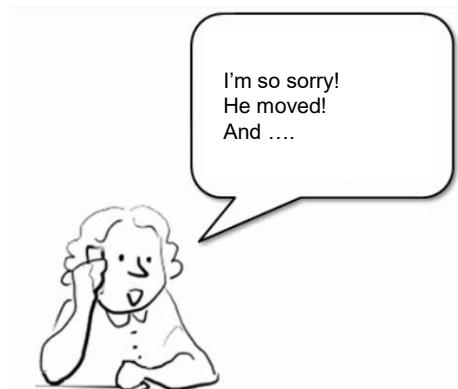
THE TSF* PROCESS

A TOOL TO FACILITATE HANDOVER



* In French « Transfert de Savoir-Faire »

Could this happen within your organization?



- he never told us he was dealing with ...
- he has not been replaced for ...
- please, send an email to our customer assistance
- I have to check if there is still someone in charge of ...
- could you send me a copy of the file as I don't know where is stored
- I don't know the password to access the system

- None of them



Staff leaving the organization:

- Retirement
- Resignation
- End of temporary assignment (consultant...)



Changes in the organization:

- Changing the Job Holder in a position
- Team / activity reorganization
- End of a project ...

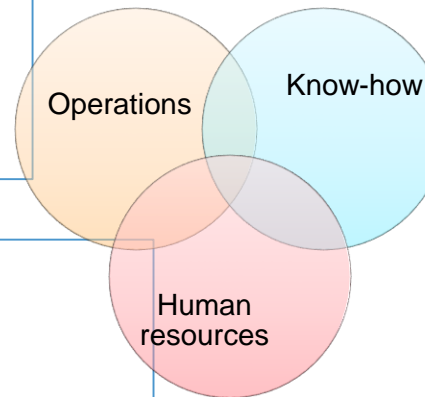


CONTEXT HANDOVER CHALLENGES



- Ensure business continuity
- Reduce handover duration
- Share all activities, including functional and transverse (i.e. Key User role)

- Emphasize the contribution of the current job holder
- Validate / correct the job descriptions
- Define actions to improve the skills of the successor
- Implement training actions



- Share ALL the useful information
- Identify, explain and document know-how
- Check the content of shared knowledge (is it correct? Is it the best practice?)

TODAY: non-standard and non-formalized **approach** left up to the responsibility of the participants.

- **Handover Period:** this period is difficult to schedule (availability of the people, duration, priorities...) and can involve high costs (salaries, travel...)
- **Experience** acquired on the job but not documented and thus difficult to share
- **Peer-to-peer** sharing: the most efficient way to share good and bad practices

AN EFFECTIVE OPTION: Implementing the **TSF process** for activities and know-how handover

THE TSF PROCESS

A THREE STEPS PROCESS

ALIGNMENT

MAPPING

ACTION PLAN

The TSF Process is very effective (2 to 3 days).
It is structured around a sequence of interviews and validations.

ALIGNMENT Preparation

- Analysis of resources (job description, org chart...)
- Interview with N+1 manager (scope, goals)

MAPPING

- Interview(s) with the current job-holders
- Drafting of the map

MAPPING Participants Validation

- Review of the Mapping by the participants

ACTION PLAN Debriefing and Plan

- Analysis with N+1 manager and HR
- Establish Action Plan

The TSF should take place with the participation of:

- The current job-holder
- A TSF expert
- The Manager (for validation)

Preferred but not required:

- The new job-holder
- The HR department for validation



The only mandatory prerequisite is the acceptance of the process by the current job holder

A graphical representation with a heuristic Map

- Area: the person (or the function)
- Features shown :
 - SCOPE (customers, activities, deliverables)
 - RESOURCES available
 - KNOW-HOW required for the job
- Sources of information: the interviews with the current job holder.



MAPPING ALLOWS A VISUAL, SYNTHETIC AND COMPREHENSIVE OVERVIEW OF THE “TERRITORY” TO BE TRANSFERRED

THE TSF PROCESS FROM THE MAP TO THE ACTION PLAN

The Map provides a reference framework for organizing the handover

- **THE SCOPE (activities, customers, deliverables)**
- **THE AVAILABLE RESOURCES**
- **THE KNOW-HOW REQUIRED TO perform the activities with the available resources**

The Action Plan is established in a meeting with the N+1 Manager

- **ANALYZE THE MAP**
- **IDENTIFY THE CRITICAL ACTIVITIES**
- **IDENTIFY THE CRITICAL KNOW-HOW**
- **PRIORITIZE ACTIONS**
- **DETERMINE ACTION PLAN**
- **ESTABLISH FOLLOW-UP PROCEDURES**

EXAMPLES OF ACTIONS

- To ensure Business Continuity:

- Organizing a shadowing period
- Peer-to-peer assistance from selected staff members
- Dispatching of activities to other services
- External contractors assistance...

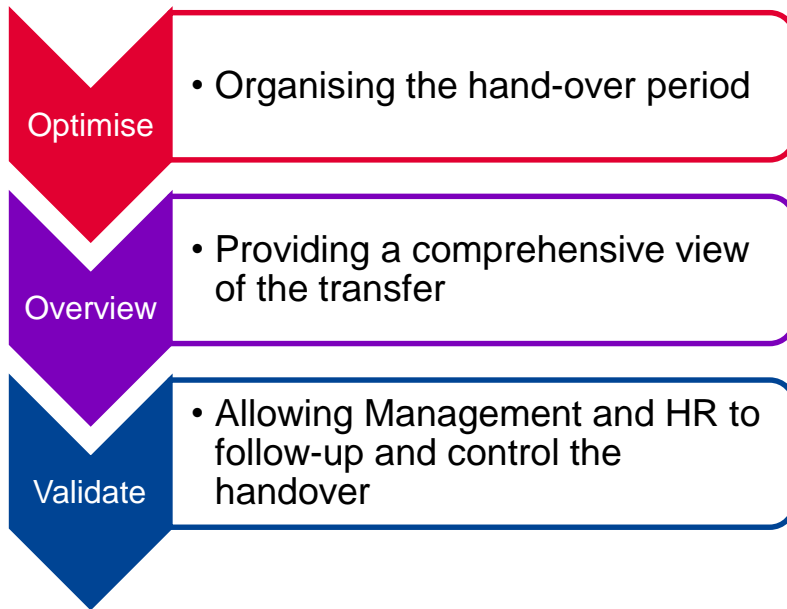
- To ensure the Management of Know-How:

- Competence development plan for the incoming job-holder (training, mentoring, assistance...)
- Review and Drafting of procedures
- Review and Drafting of documentation
- Support from internal or external experts....

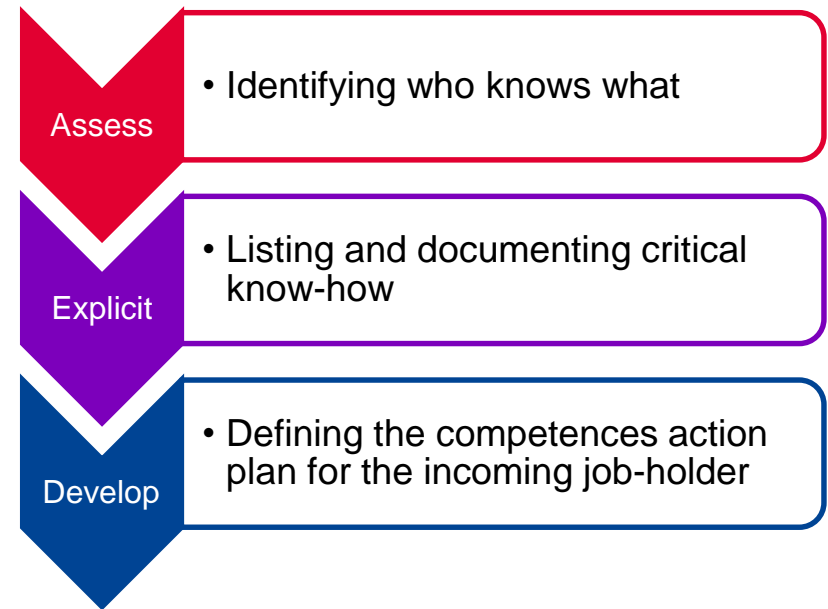
CONCLUSION

LES AVANTAGES DE LA METHODE

Managing OPERATIONS



Managing KNOW-HOW



**The support from a TSF « Expert »
to make the handover more effective**

CONTACT DETAILS

For any further information, please contact:

EXP4 Consultant
Experience Management & Training

Roberto Fiorentino
Mail: info@exp4.net
Gsm: +33 (0) 613547000