

Three Methods of Knowledge Transfer

Excerpted from *Architect's Essentials of Professional Development*, by Jean Valence

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SUMMARY

Knowledge transfer within a firm can happen haphazardly or intentionally. Firms that desire to create a culture of knowledge sharing can employ three progressive methods of knowledge transfer: training, coaching, and mentoring. Each method accommodates the needs and expertise of different professionals within the firm to facilitate a greater level of mastery for all.

FACILITATE INTERNAL KNOWLEDGE SHARING

In design firms, people learn primarily in the course of working on projects, and, typically, they share what they know on a casual, need-to-know basis. Junior staff watch in-house gurus; senior staff seek out new staff with special skills; and everyone swaps perspectives gained from conferences, committee work, and projects—if and when the mood strikes them.

To spur greater exchange among professionals, firms design professional development formats that accommodate, and stimulate, varying levels of inquiry and mastery. The full transfer of experience and wisdom from one person to another may be impossible, but when expert and novice deliberately engage, learning is facilitated, and both parties can benefit. The learner acquires a deeper understanding or greater ability; the facilitator becomes more conscious of and coherent about her or his own knowledge, hence is more likely to apply it effectively.

Training, coaching, and mentoring are three formats for knowledge transfer that work well in the framework of daily activity. In the descriptions that follow, notice that the words “expert” and “novice” are used, rather than words like “senior staff” and “junior staff,” for the simple reason that expertise does not necessarily reside in a head of graying hair. Those of us who still smart from having to earn our computer literacy at the side of a much younger person are very aware that age has little to do with proficiency. One clever design firm instituted a mentoring process to raise understanding about

sexual harassment by pairing novices—in this case, the firm’s principals, all men—with appropriate experts, all younger female professionals. Although age is irrelevant to the relationship between a novice and an expert in an architecture firm, the knowledge-sharing format dramatically affects how novices and experts conduct themselves.

TRAINING

Training exposes people to something new, typically by connecting a senior staff member with junior staff in a seminar or classroom situation. At the training level, knowledge is introduced. The expert shapes and presents ideas and information; novices listen and question. It’s school. The trainer does most of the work, determining exactly what will be shared, who the audience will be, how content will be presented, and what novices will do during—and perhaps after—the engagement. Typically conducted in classroom style, training activities demand the most expert time and involvement.

At the training level, firms can develop a curriculum of workshops and seminars, or “university,” taught by experts.

COACHING

Coaching helps people use what has been introduced to them; it includes observed practice, in which an expert observes and critiques a novice’s performance.

Coaching is more a 50-50 relationship. The coach still designs how knowledge will be shared, but the novice participates almost equally in the learning activity. Practicing under the watchful eye of the expert, the novice is hands-on, attempting to use the information and ideas that were introduced earlier, and already adopting a personal style. When knowledge is being shared, this level is likely to be the most exciting to the novice and the most unnerving to the expert. Serving as a coach to a design professional can sometimes feel like teaching a teenager to drive. Conversely, being coached by a design professional can sometimes feel like being

taught to drive by a stressed parent. Both roles are demanding.

In coaching mode, principals and project managers can adjust the project delivery process to include a “lessons learned” module, in which team members share information and insights to benefit their projects in the short term and feed into the firm’s learning dynamic over time.

MENTORING

Mentoring leads to mastery, pairing the expert and not-so novice in a less structured arrangement, in which the expert serves as a resource and the novice deliberately tests burgeoning expertise.

When knowledge sharing has reached the mentoring level, the novice has absorbed almost all that the expert can provide. The novice is now responsible for using the knowledge, adapting it to new situations, adding to it, and passing it on to others, probably in a somewhat different version. Available for feedback and collaboration, the expert is involved minimally. Novice and expert have flipped involvement levels from their training mode.

At the mentoring level, firms craft mentoring systems and protocols to institutionalize the knowledge of valued experts and clarify career paths for junior and senior staff.

VARIETY IS THE KEY TO PROGRESS

The rate at which novices move up through the three levels varies from situation to situation and person to person. A new senior manager may begin at the training level when he or she joins the firm, but only long enough to learn the firm’s particular project manager protocols and processes. A principal-in-charge may serve as coach through the new PM’s first project for the firm, or may quickly switch to mentor mode, depending on the PM’s facility with the firm’s way of managing projects.

In any case, novices in design firms are uncomfortable lingering for very long at the training level. If they feel they are being held back, they lose interest in learning. Similarly, experts can become drained and frustrated by too much time at the training and coaching levels. The solution: variety.

ABOUT THE CONTRIBUTOR

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RESOURCES

More Best Practices

The following AIA Best Practices provide additional information related to this topic:

- 03.02.02 Building Knowledge Through Lessons Learned
- 03.02.04 Mentoring as a Team Sport
- 03.02.10 Laddership: Integrating Leadership and Mentoring

For More Information on This Topic

See also “Staff Development,” by Laurie Dreyer-Hadley and Kathleen C. Maurel, Assoc. AIA, *The Architect’s Handbook of Professional Practice*, 13th edition, Chapter 9, page 242.



See also the 14th edition of the *Handbook*, which can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by email at bookstore@aia.org.



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