IDEABOOK

Event Recap & Output

◊ Approaches to knowledge transition strategies.

◊ Perspective on employee and leadership transitions.

◊ Connections with business leaders and HR partners.

OCTOBER 2023 | **30 PARTICIPANTS** | **FACILITATED**

Ben Bomar
Founder & President
Lithyus Group

Lithyus GROUP

Tim Schuster
Facilitator
PopUpThinkTank

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PARTICIPANTS

Individuals who registered & completed survey:

Joe Miu
Drew Thrasher
Michael Dubeck
Andy Jolivette
Andy Oakes
Jen Murton
Brad Koehn
Jason Troilo
Lynn Barnhart
Mike Jones
jim elgar
Lorrie Sandelin
Dave Atherton
Ali Baker
Mary Jo Kasper
John Babbs
Tim Schar
Adam Whaley
Robyn Fernandez

FORMAT

OVERVIEW
Ben presented a 5-slide overview of Lithyus, including key insights.

INTERVIEW
Facilitator asked Ben questions to dive deeper - with 7+ questions from participants.

I LIKE, I WISH
Based on what they learned about Lithyus, what do you like/wish.

BREAKOUTS
1. Your Experience
2. Growth & Development
3. Thinking Bigger

SURVEY
We deployed a survey to gauge individual next steps & source more ideas.

RESULTS

25 "I like" statements
23 "I wish" statements
38 "Experiences" reported from breakouts
47 Ideas & resources for growth & development
35 "Thinking Bigger" ideas
19 survey responses
9 individuals interested in making an introduction for Ben
95% agree or strongly agree: "I'd like to find a way to help Ben & Lithyus."

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When Employees Move On – Or Move Up

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Employee Transition Creates Risk

Consider when you've faced the following within your team

Retirement	Resignation	Promotion	Mortality
Planful	Painful	"Mixed Emotions"	Sadness

Information is not a plan

- Organizations invest in systems and procedures that collect lots of data

- Information + Context = Wisdom

- *Are you creating repositories that are unusable without context?*

Institutional Knowledge

The critical process skills, learned experience, and supportive networks that help make an individual successful.

How Lithyus Helps Clients

Recognition   Process   Perspective

Ben Bomar & Lithyus Group

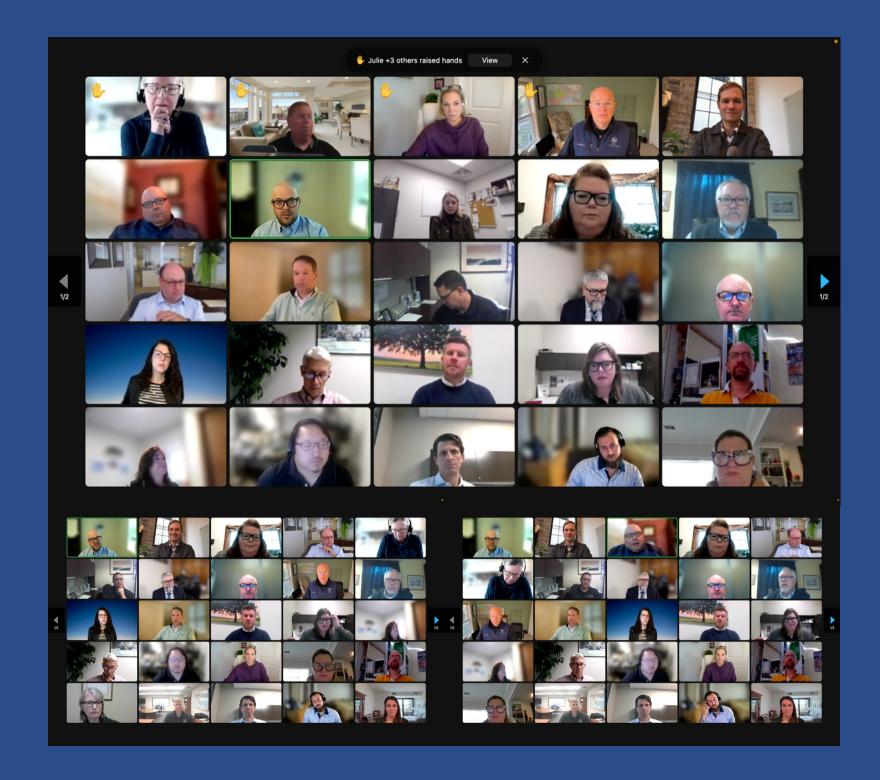Ben has been working in the US and Europe since his first role in the Czech Republic in 1997.

Has led Sales, Manufacturing, Purchasing, and Customer Support operations for Fortune 500 companies.

Leadership positions on multiple non-profit boards.

Founded Lithyus Group in 2021 to help clients understand and reduce their risk of business disruption due to employee transition.

Originally from North Carolina, Ben and his family are proud to call Minneapolis, Minnesota, USA, home.

Based on what you learned today about Lithyus, what did you like…

- The focus on strengths and enabling others to benefit from strengths employees have brought to an organization.
- The proactive approach to knowledge transfer
- The focus on addressing a critical but oft ignored issue of the loss of Institutional Knowledge.
- How Ben shares how the Lithyus' program is a turn key solution to an on going pain point many companies experience.
- A formal, standard approach to helping solve issues around critical personnel in businesses.
- The personalized nature of the services provided which capture the individualized strengths and capabilities of an employee in transition
- The use of the "urgent/important" matrix.
- The ability to retain knowledge/experiences and have documentation to set the next person up to succeed!
- The energy and passion.
- Saves time and money through a transition.

- The concept…institutional knowledge capture is very difficult, if this process being sold can consistently transfer enough of it to allow for at least outwardly facing seamless transition then there is a lot of value here
- That there's an easy to follow process to be able to handle transitions and planning for transitions. In my experience in the past, transitions have been data dumps and "week in the life, month in the life" type replays, rather than critical review and understanding.
- The passion Ben has for Lithyus and what his organization can bring to the table for the clients he works with.
- recognize and offer solutions to solve problems when people leave and organization. This offers the leaders to use resources besides themselves to continue the work
- How it helps with continuity.
- Honors the time and care an employee has put in their work.

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- How it helps the person transitioning be able to clearly communicate important aspects of their work.
- the leadership in planning ahead for inevitable change. creating trust so the knowledge transfer is sincere and helpful to the organization and the individual
- I like the fact that I've never come across a business specialising in this vital process before
- I like Ben's presentation and "nutshell" explanation of the how, the what and the why
- I like that businesses are taking this process / problem seriously!"
- That it values the person -- and more fully communicates a person's true value to the organization. That it lifts of people by recognizing how their character/behavior impact others. Glad that they exist and I hope this helps raise the awareness of valuing more of what people bring to an organization.

- Their commitment to being a positive and affirming resource for businesses and their people
- Novel approach. An 'aspirin" to a pain often felt by businesses but rarely addressed because no one really knows how to do it.
- This can really help organizations move to new people – obvious once it's in front of you.
- Selfishly, this fits my realm as a ""funnel"" to potential executive search/recruiting. This would save time in recruiting by eliminating the ""Goldilocks"" game of hotter/colder/just right in finding talent."
- The connection to the relationship side of what makes someone effective.
- There is a connection to having a tangible outcome - easy to see the benefits.
- The backstory of the name!
- The structured process; the availability of tools beyond a spreadsheet
- The focus on recognition and leaving a legacy"

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- The passion that Ben is bringing to the table. He first hand experienced and saw a business problem when it came to that person leaving after 48 years, and he proactively came up with a solution to ensure that business continued. I loved the comment that information without context isn't helpful. I think what Lithyus is all about takes what can sometimes be a stigma around people deciding to move on from organizations and help organizations understand next steps and how to ensure the business can continue efficiently
- Gather of knowledge a person's good works and that is framed around celebrating them.

- The opportunity to capture the institutional knowledge in a more enduring/sustainable way than what we currently do, which if it is a departure is the mostly-ineffective "exit interview". I think a 3rd party facilitator in these instances would yield a better, more robust and likely more useful outcome. Have not really thought much prior to this meeting about capturing the knowledge for promotions in cases where the individual is leaving the function or the role but not the company...this is interesting.

I Wish

Based on what you learned today about Lithyus, what did you find yourself wishing?

- I better understood the moment at which the services Lithyus provides would most benefit an organization.
- More businesses/organizations knew about you.
- That Lithyus could better articulate its value proposition from the customer's perspective. (I also wish I could help them with that exercise; it's a thing I do). — Brad Koehn
- It would be great if there were a program to help managers/supervisors think through how to capture institutional knowledge in those cases where the employee moving on is not cooperative
- I had access to this organization and approach in a previous role!
- Consideration for growing companies to have the ability to know new positions to add to support the business objectives. Company might think they need X but really should consider Y.

- I could see some real world case studies complete with feedback from those involved (teacher/organization and learner)
- There was a self service resource (maybe online training) with best practices and templates for planning transitions and continuity.
- I had this before either I've done transitions or when others on my team have transitioned. There's value in having this done as a service, absolutely, but as a leader, there's also value in having this as a framework that's built into the DNA of the company and its processes.
- A previous mentor called this his ""what happens if I get hit by a white van"" preparation."
- I knew more about how Lithyus follows up after a transition has occurred or whether they also engage with the new hire throughout onboarding.

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- You have talked about capturing what is -- is there an opportunity to also think about what could be? I have found in my work in organizations post-pandemic, the work has changed fairly dramatically but their workflows haven't progressed.
- That Lithyus was around during past transitions!
- more organizations, especially those in my field of government, understood the importance of knowledge transfer and best practices.
- In a number of roles, some a long time ago and another very recent, I wish I'd had the benefit of a planned "succession" - when I last changed role, I was doing intensive BAU activities right up until my last day on the job - all while trying to leave as much Information & Wisdom behind as possible. Not ideal!
- I could hear a more succinct explanation of their value and mission (what and why)

- That their was a scaleable version of this that people could do more quickly. This could help people appreciate one another and feel appreciated, while giving leaders a more 360 view of how people contribute and the inner-wiring of their org.
- Tighter elevator speech. I get the concept but it didn't 'grab' with an 'a ha' I have that problem! (But I think most people do). I think a ""DIY"" approach or a short-term for the typical 2 week notice would be gold.
- You might want to consider a tag line or word that describes Lithyus. For example, Andersen means nothing. But Andersen Windows tells the viewer what the company is and/or does. You basically turn your brand, which is a noun into an adjective."
- I could assign a value to this. It's a bit like life insurance in that you hope you don't need to use it. Combined WITH executive search, it could end up being pricey for smaller organizations...

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- I wish there was a connection to the concepts around succession planning processes.
- I wish you were talking about the evolution of people's work in their roles too. Things like task delegation and or full task transitions could be an outlet.
- How to engage employees that have 1 foot out the door?
- I knew more about how knowledge is captured, stored, archived and presented to the next employee
- What does the process look/feel like?
- How can a company's data be used to support the process"
- To see it in action. I would love to see what the end product looks like, and how successful it is in helping successors get ramped up vs just trying to figure things out on their own.

- For an opportunity to pilot this service – with an existing member of the team – who is planning to retire in 6 months, and who has ~40 years of experience in our industry and business. While we have been planful about this, and have the backfill currently in job-shadow mode, it is unlikely they will see everything and hear everything they need to in the remaining time.
- To understand how that correlates with their job description and what the organization think they do. To find a way to bring together functional teams to own the tasks and not to let it rest on one person. Making transition more seamless, and to bring in fresh perspectives.
- Wish there was someone to help manage the transition of position.

Your Experience - What has been your experience with transitions? How did it go? How did it feel?

- Losing best employee. Only have an Excel template for knowledge transfer. Learning as we go.
- Stayed within organization. If we had a more formal process to document, it would have been easier for person back-filling my position (vs. coming to me for every question).
- Rotate through a lot of jobs and have to figure it out – poor documentation of what you need. Takes a long time to figure it out.
- Three years ago lost three people at once. Really hard. Felt terrible. Three right now are leaving and we're really under water and stressed on the team. Disappointing co-workers in missing deadlines and poorer work quality.
- Roles in corporate HR leadership means managing a bunch of transitions. Oftentimes there is a hurry-up process, reactive to the issue; not a long-term plan and proactive view.

- Trying to recreate what they do is difficult and to understand how they exactly do it
- Worked hard to backup and capture knowledge through SOP. Yet to find a good way to replace experience, in context, to help someone react appropriately when what's on the page doesn't fit the experience.
- Pain points– what the 2nd and 3rd order of what they do. Can understand the top of the funnel of what they did.
- Create a lot of anxiety moving into a job where I don't have a lot of experience.
- Consistency in succession planning.
- Transitions follow change management/change curve. Optimism and excitement moves to reality and things move down the curve for awhile. Goal is to get back to the curve (and above it).. If there's a tool to get that back on, and above, that performance curve, that would be ideal.

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- Anxiety driven by the date on the calendar. Have to get so much done by that date. Process much easier without that date.
- The personal connection in relationships with clients is lost in transition often times.
- Promoted to take on a larger role -- Process went well. Needed to find a way to ask the right questions and connect to what are the skills that will make her successful. had the person in the company to make it work better.
- Do the transition during the person's tenure with the company, not when they give notice.
- Documentation through transitions--there needs to be consistent communication throughout the process.
- Wishing there was more of an onboarding process to help understand the role better.
- Try to see the departure as a gift that allows re-evaluation, re-scope the position.

- Feels hopeful wants to live in her gifts.. Overall they have all ended in jobs. Trepidation, questioning of self. Grateful for other to allow her to be successful.
- It's the little things that get lost as well in transition. IF we don't know what is in job description -not only what they do but it's also what is the team frame work. Then have to recreate the whole picture.
- Individual contributor that high performers to allow others on that higher performance curve but also that person to potentially move into other opportunities because we don't want to lose that good performer.
- Not having a playbook is difficult and can be overwhelming in a promotion setting.
- The business goes on. There's a brief moment of sympathy for the transition but nothing else slows down. Still have deliverables, timelines, business pressure. Stress, high emotions leak out in that circumstance.

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- Transitioned six times -- Climbing the ladder and has heard the generational conversations. Take an opportunity when they exist. Hasn't really had any process in any of the transitions. Not much accountability or validating handoff or coach into the position.
- Setting expectations a huge piece of it for yourself in transition, and for the organization. You're not going to know everything right away and that expectation needs to be set. You're not the previous person with the previous experience.
- Information dump was not organized and was overwhelming. And important to have context.
- Transition can be very one-sided: the person leaving may not be interested in taking the transition journey with you.
- Eliminate risk with individuals having that control over the transition that is in a highly emotional state.

- Hired into replacement role in HR -- boss didn't know how to explain what he would do. Heard something different from his boss at his annual review (lack of clarity) Hired in as the number 2 employee -- owner did a pretty good job with some surprises along the way
- I communicate the mission, vision, etc. during onboarding process. Transitions require specifics around daily details. Biggest challenge: what happens when you have had a transition and are not sure how to address questions from the new person about the way the old person did something (with honor, truth, and respect).
- Transitions were fairly bumpy and all unique. If there's a consistent way to do it effectively and successfully, that would be really something valuable.
- Limited timelines and a bit of a "fire emergency" when these things happen. Can company culturally prepare for this to happen.

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- What I see from others -- They feel supported, and they don't know where to go to get their questions answers. Leaders struggle with how to develop people for their role.
- What's the value statement, what are the quantifiable outcomes when transitions are all quite different?
- Helpful to pass on information about roadblocks and challenges along with the good through a third party, helps incoming folks know what to expect.
- Felt so stressed in my last transitions and trying to leave things for the next person
- I work with clients that may be the owner and a critical part of the business--helping with emotional side of the transition. I could use the process documentation skillset to supplement the human/emotional side. My clients have long history in their positions--use intervention techniques to work through situations.

Growth & Development - Where do you go for your leadership and/or HR resources? What brands, resources, podcasts, thinkers/authors, or communities are you turning toward for learning?

- I am the member of TC SHRM--helpful articles, conferences, etc.
- I work for a large org--lots of internal networking and centers of excellence to learn from.
- Local branch manager serves as a personal funnel for information. Provides the resources and information. Not much relational aspect. There are manuals and processes but there is not a lot of conversation.
- I work in the government sector--I look externally for HR resources.
- Association for Talent Development, Adam Grant, Association for Healthcare Foodservice (Technical); Academy of Nutrition and Dietetics, Center for Creative Leadership, Didactic Dimensions International, Seth Godins - daily email, Squiggly Careers,

- Linked In has great tools and resources related to learning, transitions, etc.
- For leadership, Harvard Business Review subscription. Strategic thinkers events. Finding networking events to keep yourself fresh, inspired and engaged.
- Chamber of commerce has individuals that are good resources or are good sources for networking.
- UW Milwaukee, UW Madison School of Business, Harvard Executive leader training, Harvard Business Review, read a lot of books Patrick Lencioni
- Stack Overflow--for technical problem-solving resources.
- Attending conferences, online training, and subscribing to news feeds and podcasts.
- ERE.com

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- There are no resources for employee transition. Just had to deal with it.
- Brene Brown is a great resource."That is my background!" - Peers, and since becoming independent, cohorts of other leaders in the same line of work, Conferences and all the conversations that happen there.
- LinkedIn - for finding people and Groups - as well as learning.
- Podcasts - "The Future of Work"
- MN Recruiters
- Organization training - Sandler
- Sourcecon
- SHRM
- Gartner subscription--communities, articles, etc.
- LivingHR
- Society of human resources (SHRM) has workshops but they are topical but are not for long term cultural and organizational focus.
- Coursera

- TED talks
- Blinkist or Headway -- business book synapses
- Harvard Business Review
- Alban Insitute, Appreciative Inquiry Commons, Community by Peter Bloch, Theory U book Otto Sharmer Change by Peter Steinke (book)
- Gartner
- Being willing to be curious and talk to people no matter where you run into them.
- Colleagues and connections
- Instagram providers and accounts (tips and tricks) -- software, database, technical things (with videos); LinkedIn, community (Ben); peers (new industry)
- Performance Excellence Network
- LinkedIn Learning
- Business Model Canvas, Business Model U, Business Model for Teams, the design thinking toolbox
- Diversity, Equity, Inclusion - Team Dynamics

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- Finding our Way – Prentis Hemphill (Podcast)
- Leadership Development – Executive Coaching firm – input from behavioural psychology sources and academic study of same.
- "Motivational Interviewing" – recommended book on managing change.
- Medium –– bloggers on specific issues (wide range of topics and ideas)
- ChatGPT
- Dr Travis Bradberry – EQ, Emotional Intelligence Habits
- Brene Brown – writings & podcasts. Local events and community events, LinkedIn & alum groups.
- Team Women––focuses on leadership for women (and young girls). Focus is on leadership across the span of a career.
- Consero –– face to face meeting with panelists and topic/groups
- Lots of content on LinkedIn and other social media outlets (Facebook, YouTube).

- Dale Carnegie Leadership training Organization training but tailored to the unique needs for the organization.
- Community colleges
- "Leader As Coach" program run by HR
- Mentorships programs – both as Mentor and Mentee

Thinking Bigger - What did we miss? Dream with us. The sky is the limit! How can we think bigger and better? How can we 10x Lithyus?

- Certification program for people to perform this service in-house.
- What is the actual model? What does the output look like? Digital? Storable? Or just video recording.
- Complimentary resources -- other people who are consulting, but would find what he's doing is a good compliment
- Is Lithyus involved after the handoff of information (while new hire is in the onboarding process)? Are there check-ins?
- How holistic is it? Bridging between colleagues in an organization.
- DIY version for "two-weeks to leaving" product. A workbook, or other material for purchase by the customer to run the process themselves. Maybe go through a 2-hour webinar first to be able to access the material. Now armed with the tools can muddle through it.

- Succession planning and talent planning; how do you evolve individuals into other space; what is in their current role and looking to expand (how to delegate, other ways to leverage processes for a different outcome)
- Subscribe to your resources on a continuous basis. Credits for various kinds of services or levels of need.
- Could they provide an offering that includes training (for standard, common functions/roles)? Could this be developed?
- How do you transition a very techie role (code or data)? Is there a utility to do that or could one be created? Excel, but maybe more than that?
- Get to senior level leaders (owner / operators) of bigger companies. Lot of HR people limited willing to think about the broader success of the company. Don't want to bring outsiders in.

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- Pre-packaged programs for common transitions: change in ownership, retirement. Ready-to-go, fixed-price engagements, perhaps priced by level in the organization.
- Is it better to document the "back room" of worker bees....or to capture the scope of leadership. Differentiate these as two different products. Likely two different pricing schemes.
- Can they explore "what could be?" and not just document 'what is'?
- From the software role: Lithyus is a one-to-one. How roll this out through software where it's not one-to-one?
- Support lean teams (while not becoming another project)
- For people at a ceiling in the organization, a resource pool of people who are ready to transition into a new role at a new organization.
- Transfer knowledge in SALES. Not just for departures, but for BEST practices.

- Relationship business and you need to be in it to describe it: need a compelling way to describe it without being so specific people eliminate themselves because they don't anticipate a match. What's the funnel that brings people in? A succinct, compelling story to draw people in.
- We're about to lose a valuable resource... for the new person coming in to go to Lithyus to know what questions they need to get answered to be successful.
- Cost / benefit analysis -- how are you saving on the cost of hiring, onboarding. Ex: replacing a nurse in Wyoming is $100k.
- "The First 90 Days" is a book that helps new employees to enter a new organization. Great read.
- Scale this process with 360 feedback, fewer personal interactions, maybe a leaner process

- How could the information obtained be thought-provoking for other businesses? Become something like a library of information to help companies with their objectives? How bring best practices to a larger audience.
- Sharing case studies of the kinds of impact your process can have would help customers understand your offering.
- How could Lithyus support an expanding team--with hope to grow existing team. Are check-ins (with deliverables) included--to maintain and/or create lasting relationships and ensure long-term value. Could Lithyus build longer-term relationships with refresher sessions to keep on strategy?
- Person moving: if you're not taking anything confidential, take examples of your own efforts.
- When people join: what made you successful in your last role?
- Lithyus University (online courses)

- Can you demonstrate ROI? Culture index can quantify e.g., the price of a bad hire. What is the financial impact your services can have to the execs?
- What is the deliverable that's unique. WHY do this versus do it on my own? Is it the process
- Templates, checklists for onboarding and transitions.
- What content library are they building for themselves -- buckets of things that are the same (Account executive would share info with account executives) -- personas
- Possibly include more in-person interactions for those who request them across the country?
- Quick transition kits. Something managers/employers can order to get content online (maybe videos, checklists, templates) that will provide insight when someone puts in their two week notice.

Notes, ideas, and key insights from the post-event survey. Thank you!

- "In addition to capturing knowledge when someone leaves, can it be captured when someone joins? What made you successful in your prior role?
- Can a company's data be used to help capture the institutional knowledge of a terminating employee? Who does the person chat/email the most? What applications or websites are most visited? Who do they call on the phone the most? May be too ""big brother"" but could help define the landscape?
- I think there is something to the concept of ""leaving a legacy."" We aren't all engineers that can point to buildings or bridges we've created during our time with a company. For knowledge workers, how do we create something tangible that reflects the worker's contribution to the company?"

- Develop a way to show value (ROI) to pitch so you can price it. It's a good idea, but a bit like buying life insurance.....
- Can you help teams managing growth and adding employees to refine roles and responsibilities in conjunction with designing and hiring roles?
- Capture testimonials from not only the sponsoring client/leader that you are engaging with, but also the actual person that took the new role. For clients that are really serious about succession planning and knowledge transfer, is there a way to survey the new hire/promoted person 6 months or a year after the initial engagement? I think there could be some gold in their responses to what components were critical to their success after handoff.

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- "We should talk! Some of my clients could use your services. I have partnerships with a number of procedurals that I bring when serving a client."
- Forward integration into prescribing best-practice management techniques for roles that are common across industries and organizations. This would enable productivity progress in addition to transition.
- Case studies that can show a quantifiable impact to a business.
- Keep spreading the word and growing your business – the need will only grow as the last generation to grow up without the internet starts to leave the workforce!
- More "hammer" on the "nail" of cost of turnover and loss of organizational intelligence.
- Continue to work on providing some examples of the great work you're doing.
- What are the example outputs and how can you "seed" the idea with concrete examples that people can latch onto and use?

- connect with estate attorneys who often are brought in prior to a business transition (particularly for family owned enterprises).
- Connect with small M&A firms and mid-market private equity firms who focus on creating better processes when they buy a company.
- As a talent consultant, I think about the future of work a lot. I think there are a few categories of potential that you may want to consider if you aren't already. 1. Remote working and Hybrid work – and the impact that has on knowledge transfer. I think the angle is how your process is key and needed because people aren't together as much. 2. The impact that AI will have on adjusting the duties of workers and the demand for roles. Again, this is more about the impact on the people as AI transforms the work people do and who does it. Knowledge transfer and adult learning tools are going to be helpful in the short term and long term.

Thank you!