

## Job Continuity Books

By Michael Prevou

The desire to capture and share workplace knowledge is a key element of any knowledge management program. The need to prevent corporate knowledge loss resulting from retirements, transitions and budget constraints often drives organizational leaders to demanding Continuity books. They are often considered more trouble than they are worth. They generate more work for the parties responsible for creating and maintaining them and, in most cases; they are never used by the follow on personnel. Instead, knowledge sharing activities should be built into organizational learning programs and well-documented workplace processes should be maintained and trained regularly.

That said, many organizations don't have formal learning programs, online collaboration systems or well developed processes that lend themselves to good documentation. If this is your situation, then a continuity book may be right for you. If so, keep your book clear and concise (no more than 6-10 pages) and ensure it answers the 10 key questions below.

Job Continuity Books (typically used to document an individual's key responsibilities)

1. What job does this book address?

List duties and responsibilities or tasks by inserting the approved job description and key tasks list. Add additional tasks and responsible that you actually perform and strike through those you no longer perform. Striking through them rather than removing them should generate a conversation during a transition.

2. In performing this job, who do you interact with the most?

For each of your critical tasks, list name, phone number, email, and why you interact with them. Identify ant working groups, committees or forum in which you participate to perform this task.

3. Who are your top information sources?

Identify subject matter experts for to top 5 tasks or topics (or both) identified in question 1 above. They may be same or different from people you interact with regularly. List the name, phone number, email of each SME.

4. Where do you keep "critical information" associated with this job? In which shared drives, hard drive folders, knowledge repositories (Enterprise Content Management system), desk drawers, or shoebox is the information stored?

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5. What common tasks do you perform? Alternatively, what are the common topics you deal with?

These may be different than the duties and responsibilities listed in question 1. They might include your role in routine meetings, serving as an subject matter expert, being on call for certain days, locking up the building in the evening or cleaning up the break room every Thursday. For each of your common tasks, list name, phone number, email, of who you interact with or report to and why you interact with them.

6. What does a typical day/week in this job look like?

Address recurring meetings, events, calls, and other activities associated with routine conduct of the job. Provide event name, time and location (if applicable), participants, and purpose. Providing a graphic to support your list of events in a typical week is a good way to organize events and see the big picture.

7. What are the three things you do that are critical to the success of the organization or team?

List items, why they are important, and who else does the same or similar functions.

8. What are three things you have learned that you wish you had known when you started your job?

Don't just list topics, tell a story and provide insight on where others can get this information.

9. What is the biggest challenge your replacement will face?

10. What advice would you give to your replacement?

If your Continuity Book is being developed as part of an off boarding or out-processing program, you may also want to include a question to help document your time at the organization. We suggest you address the two or three initiatives or products you are most proud of during your time with the organization? What is special about them? What made them effective? This question provides context for your replacement as to what the job involves.

These 10 questions also provide a great way to conduct annual performance reviews. They make everyone take a hard look at what they do, and how it contributes to the company bottom line. Very often the simple awareness of that linkage combined with good coaching and leadership creates a learning culture and a focused workforce.

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Maintaining the continuity book can become overwhelming if not managed correctly. One technique we have seen is to initially create Continuity Books is to establish a Continuity Book category (note I did not say folder) on the company ECM and have everyone build their JCB a few questions at a time over several weeks. If an ECM is not available, a hard copy maintained on each employee's desk provides an immediate reference.

Once they are built, set aside 1 hour each quarter to have everyone revise and update their JCB and return it to the file. Managers can easily check to see when this task is completed and can add their own notes to individual JCBs. Spending one hour per quarter will save hundreds of hours in unproductive time during transitions and increase the awareness who does what and why of each worker and supervisor.

At SKS we can help your organization assess its current ability to collaborate, capture and share corporate knowledge, identify gaps and provide solutions that support achieving your business objectives. We have worked with nearly 30 different organizations in the public, private and non-profit sectors and identified many common trends and tips and techniques that can improve individual, team and organizational performance. Give us a call at 913-547-1163 or email Mike Prevou at [mike@strategicKS.com](mailto:mike@strategicKS.com) .