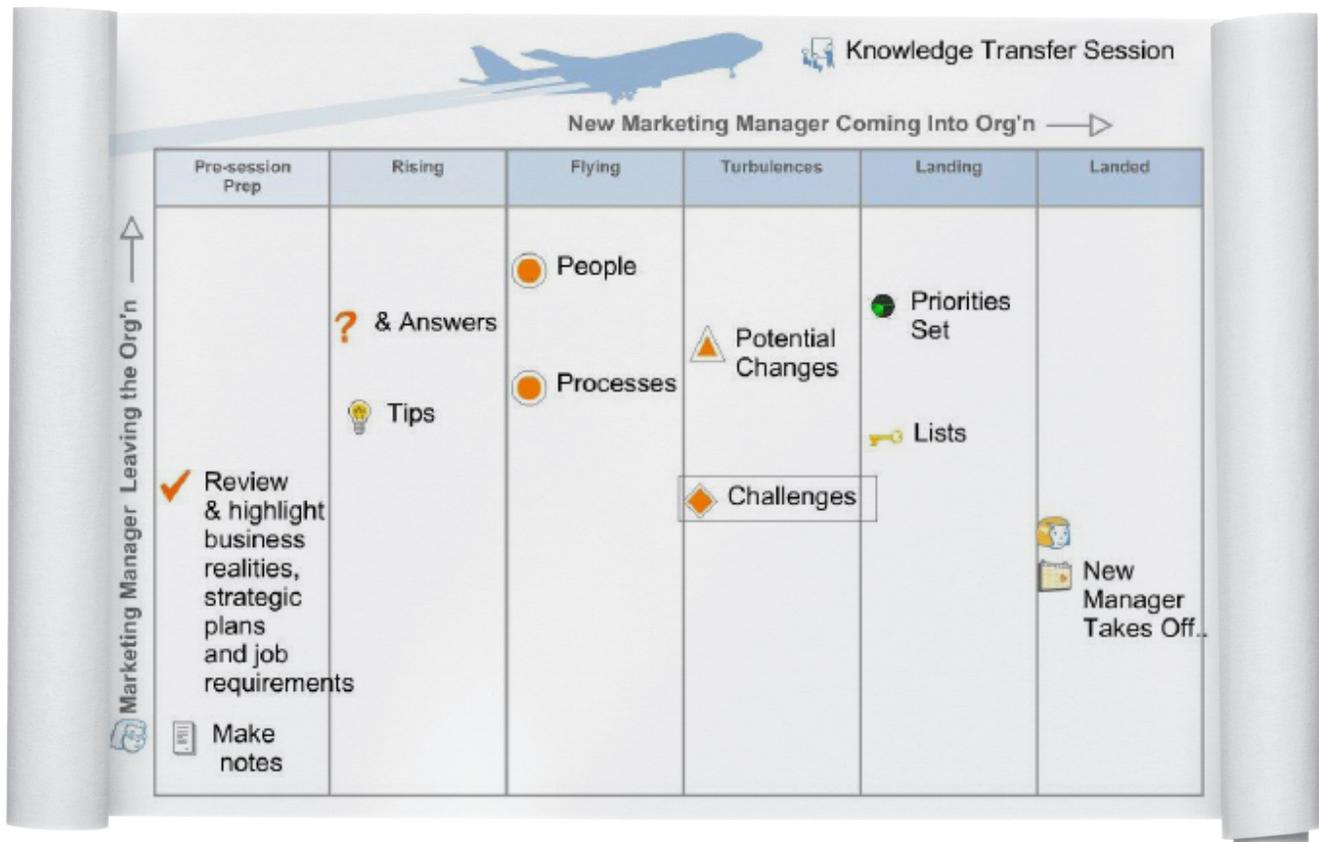


CLIENT | Hospital Foundation

DATE | April 2011

NATURE OF SERVICES | Knowledge Transfer Session



CHALLENGE

A marketing manager was leaving her position and wanted to leave things as perfect as possible. A new marketing manager had been hired and wanted to learn as much about the position as she could during her "overlap" week.

In doing the work, there were a few challenges:

- > Time constraints
- > Openness to share knowledge
- > It was a fairly new position and not much documentation was in place

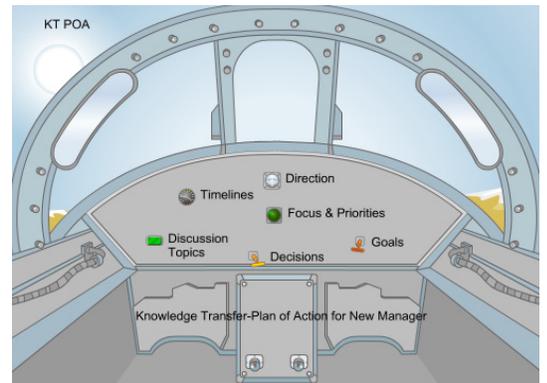


SOLUTION

We used a Knowledge Transfer Flight Plan visual template to work through the process. Four questions were explored in detail and graphically recorded on a large wall chart.

1. What do you think will be the three biggest changes that will take place at the hospital after your (the outgoing marketing manager) departure?
2. What opportunities might each change bring?
3. What challenges might each change bring?
4. How will you, your boss, and the Foundation make the most of the opportunities or how will you diminish the impact of each challenge?

Knowing that this was a team in transition, we also came prepared with a large Transitions Curve on a wall chart* (credit to William Bridges) and discussed the change process.



RESULT

Here's what our client had to say about the Visuals@Work process:

"Michele did a terrific job graphically facilitating a knowledge transfer workshop for the Marketing and Communications department at my organization, the fundraising arm of a leading Canadian hospital.

It was very apparent that Michele had taken a great deal of time to get to know the background of our Foundation and her animated style of facilitation was perfect for a room of creative marketers. As the staff member that was leaving the organization, what I found particularly beneficial was that the workshop provided an open forum to share my insights on how work processes could change, what my replacement should look out for and what future developments they should take into account when stepping into my shoes.

Michele's enthusiasm is infectious and when combined with a snappy, new approach to facilitation and her innate knowledge of the healthcare industry, we walked away with relevant ideas for implementing next steps. Thank you!"

* Wall chart was created with interactive software.

