# Exit Interview and Knowledge Retention Tools

When an employee leaves an organization they will also be taking with them explicit and tacit knowledge about their jobs and thoughts on how to improve the organization and the specific job. It is important to an organization to implement ways to retain this knowledge to both improve the workplace and to assure that critical information is available for the staff members’ replacement or available to those staff who are taking over the tasks either permanently or temporarily until the replacement is in place. The intent of this document it to provide tools so an organization can implement effective processes for the Exit Interview and for the Knowledge Retention Interview.

### Exit Interview & Tool

The exit interview with a terminating employee is an organization’s opportunity to obtain information about what your organization is doing well, and what your organization needs to do to improve. Used with employee satisfaction surveys, the exit interview can be an excellent source of information for organization improvement. Many organizations, in order to assure the departing employee is comfortable answering the interview questions, will have the Human Resource department or other neutral position conduct the interview. Once the interview is completed, the responses should be compiled and shared with the appropriate managers and administrators. To optimize the use of exit interviews and as a good quality assurance practice, it is worthwhile to compile the data from a series of interviews (example: all interviews from the previous year) to examine for trends or ongoing problems that need to be addressed.

Below is an example of Exit Interview questions:

1. Reasons for leaving: a. Major reason, b. minor reason.
2. What did you like about the position?
3. What did you dislike about your position?
4. Do you feel you need to be replaced?
5. What skill set is needed/required in this position?
6. What qualities are most valuable for a person to succeed in this position?
7. What were the barriers to succeeding in this job?
8. What should the organization do in the future to not lose a valuable person such as you?
9. What are 3 things you accomplished in this job that you are most proud of?
10. Suggestions for orientation and training of replacement.
11. Suggestions about what should be evaluated and changed about the job.

### Knowledge Retention Interview & Tool

Knowledge management is a systematic process of connecting people to people and people to the knowledge and information they need to effectively perform and create new knowledge. Knowledge comes in two forms: explicit and tacit. Explicit knowledge, formal and often codified, comes in the form of books and documents, procedures and, policy manuals, etc. The tacit and not codified form, in contrast, can be found through interactions with employees, customers, and the memories of past vendors. This knowledge is hard to catalog, highly experiential, difficult to document in detail, ephemeral, and transitory. It is also the basis for judgment and informed action.1

The Knowledge Retention interview is an attempt to retain critical knowledge that is people-specific and at the risk of loss, used by the departing employee to perform their tasks or to make decisions. The questions should be introduced to the employee as soon as it is known they will be leaving the organization. A follow-up interview(s) should be scheduled with the employee by the supervisor and/or peers to review and discuss the questions. Depending on the depth and breadth knowledge, there may need to be a series of interviews. The knowledge obtained can be used to assure continuation of critical activities prior to staff replacement and as a helpful guide and orientation tool for the new replacement employee.

Below is an example of Knowledge Retention questions:

## Knowledge Capture Topics and Questions:

1. What are the 10 hardest problems you face on a regular basis?

2. What are the 10 most common mistakes/errors you face?

3. What are the 10 most important lessons you have learned?

4. What are the 10 cleverest tricks you know of?

5. Who are the 10 most important people for this role to interact with successfully externally? How, why and how frequently do you interact with them?

6. Who are the 10 most important people for this role to interact with successfully internally? How, why and how frequently do you interact with them?

7. If you had 1 day to brief your replacement, what would you discuss?

8. When you started this position, what do you wish you had been told?

9. What are you most worried about falling through the cracks when you leave?

10. What committees/working groups are you on that we need to continue to be on? Who would you recommend to serve on that committee?

11. Where do you keep your files and data? Where do you keep the intellectual property of the laboratory?

12. What projects are you currently working on? Who are the contacts for these projects?

13. What other activities are pending that need to continue?

14. Who else knows what you know or details about what you have been doing?

1Executive Summary, “Retaining Valuable Knowledge: Proactive Strategies to Deal With a Shifting Workforce,” Consortium Learning Forum, Best Practice Report. APQC, 2002.

**Exit Interview Survey**

Staff Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Area Worked: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position Classification/Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Years employed: \_\_\_\_\_\_\_\_\_\_\_

1. Reasons for leaving:

a. Major reason

b. minor reason.

1. What did you like about the position?
2. What did you dislike about your position?
3. Do you feel you need to be replaced?
4. What skill set is needed/required in this position?
5. What qualities are most valuable for a person to succeed in this position?
6. What were the barriers to succeeding in this job?
7. What should the organization do in the future to not lose a valuable person such as you?
8. What are 3 things you accomplished in this job that you are most proud of?
9. Suggestions for orientation and training of replacement.
10. Suggestions about what should be evaluated and changed about the job.

**Tacit Knowledge Capture Topics and Questions**

Staff Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Area Worked: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position Classification/Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Years employed: \_\_\_\_\_\_\_\_\_\_\_

1. What are the 10 hardest problems you face on a regular basis?
2. What are the 10 most common mistakes/errors you face?
3. What are the 10 most important lessons you have learned?
4. What are the 10 cleverest tricks you know of?
5. Who are the 10 most important people for this role to interact with successfully externally? How, why and how frequently do you interact with them?
6. Who are the 10 most important people for this role to interact with successfully internally? How, why and how frequently do you interact with them?
7. If you had 1 day to brief your replacement, what would you discuss?
8. When you started this position, what do you wish you had been told?
9. What are you most worried about falling through the cracks when you leave?
10. What committees/working groups are you on that we need to continue to be on? Who would you recommend to serve on that committee?
11. Where do you keep your files and data? Where do you keep the intellectual property of the laboratory?
12. What projects are you currently working on? Who are the contacts for these projects?
13. What other activities are pending that need to continue?
14. Who else knows what you know or details about what you have been doing?