

**APHL
Lab Director Transitions Guide
Online Toolkit**

[Headline]

Exit Interview and Knowledge Retention

How to sort through and capture a departing lab director's knowledge

A lab director who leaves a lab takes his or her brain along, too. Large amounts of knowledge go with it including how the lab works, what the job entails and how things can improve. Some of this is knowledge the director—and other leaders—might not even know is there.

How can lab leaders tap into this resource, and bring what's behind the scenes to light? Here are some tips to keep knowledge from leaving the lab, as well as processes to dredge up ideas and know-how that might have been hiding away.

The Exit Interview

This conversation is an opportunity you don't want to waste. You can get frank information on what your lab is doing well and what it needs to improve.

To ensure the departing director is comfortable, tap the human resource department or other neutral position to conduct the interview. Afterward, compile and share responses with appropriate managers and administrators. To optimize the interview (and as a good quality assurance practice), try compiling data from this exit interview with other exit interviews from the year to see if any trends emerge or if there are ongoing problems.

Here are some examples of exit interview questions:

1. What is the reason for leaving? Is that reason a major or a minor one?
2. What did you like about the position?
3. What did you dislike about your position?
4. How do you feel you should 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 three things you accomplished in this job that you are most proud of?
10. Do you have suggestions for the orientation and training of the replacement?
11. Do you have suggestions about what should be evaluated and changed about the job?

The Knowledge Retention Interview

To go more in-depth, a knowledge retention interview can help retain more critical know-how, particularly the kinds that are people-specific.

It is designed to uncover both explicit and tacit knowledge. Explicit knowledge, formal and often codified, comes in the form of books and documents, procedures, 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, ephemeral, transitory and difficult to document in detail. It is also the basis for judgment and informed action.¹

The knowledge retention interview can be a single interview or a series, with the supervisor and peers.

Here are some questions you can use for this type of interview:

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?
5. Who are the 10 most important people externally for this role to interact with successfully? How, why and how frequently do you interact with them?
6. Who are the 10 most important people internally for this role to interact with successfully? How, why and how frequently do you interact with them?
7. If you had one 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?
15. With what outside groups are you collaborating or have developed partnerships? Who are the primary contacts with these groups?

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