



1. Situation

- Global engineering services company in the steel industry
- Historically held market share lead over all other competitors
- Basis for competition comes from highly experienced application engineers
- Core engineering knowledge resides in small number of people
- Most are nearing retirement age and will take expertise with them
- Very little done to back up their knowledge and experience

3. Deliverables

- Performed survey to create “knowledge map” of who had what critical knowledge and in what form
- Evaluated methods for retaining and transferring the core knowledge
- Developed company-wide mentoring program as the way to capture and transfer knowledge
- Developed robust mentoring process and metrics
- Identified and trained mentors and protégés

Engineering Services Industry

2. Key Issues

- 50% of the core knowledge engineers likely to retire within the next 5 years
- If the experience is lost, it will have a negative impact on ability to compete for new business
- Company has supplemented resources over the past few years by using contractors rather than new hires to reduce vulnerability during business down cycles
- Everyone currently busy on current project work with no additional capacity

4. Results

- All identified critical knowledge workers assigned as mentors with minimum of two protégés each
- Plans developed to transfer all core knowledge via current project work over next three years
- Protégés being used to quote new business with mentors as backups
- Two new large contracts won from proposals developed by protégés

“We needed to develop a robust mentoring program and get our people on board quickly. In less than three months, Conequity helped us build a knowledge map, created a custom mentoring process, and helped train and launch our program.”

COO, Engineering Services Company