

Six Steps to Preserving Institutional Knowledge

1

Train Employees on Your Knowledge Management Tool

Younger workers may have gotten in the habit of turning to more seasoned employees for answers and guidance. Remind them that those answers live in your [insurance knowledge management tool](#). Provide regular training sessions so they can confidently access documents on their own.

2

Seek Out Employee Notes

Seasoned brokers, underwriters, and claims adjusters started their careers without technology. That means they likely have personal notes on internal processes and client information. Regularly ask your experienced employees to share those notes. Upload them to your insurance knowledge management system so all necessary parties can access that information.

3

Conduct Regular Content Audits

Take stock of the [existing content in your library](#). Organize your documents into detailed categories so you can flag any content gaps. Work with your more seasoned employees to fill those gaps.

4

Leverage In-Platform Announcements

Your team should know when you add or edit documents in your tool. Share those updates within your announcements. That way, employees will know which resources they should be leveraging.

5

Encourage Knowledge Sharing

Younger brokers, underwriters, and claims adjusters want to learn from their more experienced counterparts. Before the older workforce retires, strive to make knowledge-sharing part of your organizational values. Create time and space for seasoned employees to share notes and account insights with newer team members.

6

Socialize the Off-Boarding Process

Have newer employees shadow those who are a few weeks out from retirement. This creates the opportunity for sharing implicit knowledge, giving the less-seasoned employee the chance to learn which manuals and job aids are most useful, along with tips for working with specific clients.

If you want to preserve institutional knowledge, you need the software to support you. [Reach out to ProNavigator](#) to learn how we can help.