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# Leadership Strategies for Capturing and Transferring the Knowledge of Experienced Workers in Canadian Higher Education Organizations

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# Walden University

College of Management and Human Potential

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Walden University  
2025

Abstract

Leadership Strategies for Capturing and Transferring the Knowledge of Experienced

Workers in Canadian Higher Education Organizations

by

Dean Allan Bulloch

MBA, Royal Roads University, 2008

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

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December 2025

## Abstract

Higher education institutions face a risk of knowledge loss when they fail to implement strategies for transferring knowledge from experienced to less experienced employees. Canadian higher education managers are particularly concerned about the adverse impact of losing explicit and valuable tacit knowledge. Grounded in the socialization, externalization, combination, and internalization model, this qualitative pragmatic inquiry study identified and explored successful strategies employed by eight Canadian higher education managers to capture and transfer knowledge from experienced employees, thereby sustaining performance. Data were collected through semistructured interviews and a review of public documents, including strategic plans, annual reports, and accountability statements. Through thematic analysis, three themes were identified that could assist higher education institutions with knowledge transfer, including implementation of (a) a knowledge-sharing culture, (b) mentoring and coaching, and (c) technology adoption. A key recommendation is for higher education managers to integrate formal, structured knowledge management processes with people-centric social learning methods, such as mentorship, to effectively capture explicit and tacit knowledge. The implication for positive social change may include the professional development of individuals and the reduction of knowledge gaps while ensuring business continuity within the community.

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## Section 1: Foundation of the Study

### **Background of the Problem**

The COVID-19 pandemic, followed by the Great Resignation, led to widespread voluntary employee exits across industries, intensifying knowledge loss and disrupting organizational continuity (Serenko, 2023). Although these trends peaked in 2022 (Serenko, 2023), recent economic challenges, particularly the 2025 Canada–U.S. trade war, have further strained the Canadian labor market, resulting in increased unemployment and organizational instability (Bounajm & Devakos, 2025). These shifts have exacerbated existing concerns over knowledge retention as companies face both unexpected departures and long-anticipated retirements.

Demographic changes underscore the urgency. As of 2021, nearly 20% of the Canadian workforce was nearing retirement age, and the senior population is projected to reach 30% by 2068 (Statistics Canada, 2023). The World Health Organization (2022) estimated that by 2030, 1 in 6 people worldwide will be over 60 years of age. As seasoned professionals leave the workforce, organizations risk losing critical experiential knowledge, especially in environments where cultural, linguistic, and procedural differences complicate knowledge transfer (S. Singh & Dhir, 2024).

### **Business Problem Focus and Project Purpose**

The specific business problem was that some Canadian higher education managers lacked successful strategies to capture and transfer the knowledge of experienced employees to sustain organizational performance. Therefore, the purpose of this qualitative pragmatic inquiry study was to identify and explore the successful

strategies employed by some Canadian higher education managers to capture and transfer the knowledge of experienced employees, thereby sustaining performance. The research included gathering information through semistructured interviews with eight human resources managers, academic chairs, and deans from higher education who had developed and implemented successful knowledge management (KM) and transfer strategies. Participants were purposively selected from Ontario higher education institutions and had a minimum of 3 years of experience in academic administration. As a former administrator at a Canadian higher education institution, I had professional networks that provided me with access to individuals who met the participant criteria of my study.

Pragmatic inquiry research typically relies on interviews as the primary data collection method. I used an interview protocol as my main data collection tool. To collect the data, I used semistructured interviews and publicly available documentation. The conceptual framework for this study included Nonaka's (1994) organizational knowledge creation (OKC) theory, based on its concepts of socialization, externalization, combination, and internalization (SECI).

### **Research Question**

What strategies do Canadian higher education managers use to capture and transfer experienced employees' knowledge to sustain performance?

## **Assumptions and Limitations**

### **Assumptions**

Assumptions are beliefs considered accurate but not verified (Kirkwood & Price, 2013). Assumptions are important for transparency and the interpretation of study findings. Three assumptions were made in the current study. First, I assumed the research participants would be forthright in their responses to the interview questions. Second, I assumed the participants' knowledge regarding strategies for capturing and transferring the knowledge of experienced workers in Canadian higher education institutions would be factual. Third, I assumed that higher education managers continuously improve their strategies to capture and transfer valuable knowledge of experienced employees to less experienced employees, thereby sustaining performance.

### **Limitations**

Schary and Cardinal (2016) described limitations as potential weaknesses outside the researcher's control, or as constraints, flaws, or shortcomings of a study that may impact the interpretation of the findings. The first limitation of the current study was that participants might not have been entirely interested or forthcoming during the interview process. Second, research participants may not have had the proper experience to speak to the topics outlined in the study. Third, participants may not have fully shared proprietary institutional information despite my best efforts to ensure confidentiality. Each of these limitations could affect the transferability of the study's findings.

## **Transition**

I identified and explored successful KM strategies that some Canadian higher education managers use to capture and transfer knowledge from experienced employees, thereby sustaining performance. Section 1 included the background of the problem, the focus of the business problem, the project purpose relating to the specific business problem, and the study's primary purpose. The research question was also provided, which aligned with the specific business problem and purpose. The study's conceptual framework, assumptions, and limitations were included. Section 2, the literature review, constitutes the professional and academic literature review regarding Nonaka's (1994) theory of OKC and literature addressing the topic of knowledge transfer in organizations, the loss of organizational knowledge, the impact of loss of knowledge on the sustainability of performance, and the role of management in overseeing knowledge transfer. Section 3 describes my approach to adhering to the required project's ethics and my role as the researcher. Section 3 also explains how I conducted the qualitative pragmatic inquiry, including data collection and analysis activities, as well as my approach to ensure the project's reliability and validity. In Section 4, I discuss the findings and the implications for business practice, social change, and further research.

## Section 2: The Literature Review

### **A Review of Professional and Academic Literature**

This qualitative pragmatic inquiry study aimed to identify and explore KM strategies used by some Canadian higher education managers to capture and transfer experienced employees' knowledge to sustain performance. In the changing landscape of higher education, identifying key drivers of organizational performance is essential (Suparwadi et al., 2024).

### **Literature Search Strategy and Method**

The conceptual framework for this study included Nonaka's (1994) OKC theory based on SECI. The target audience consisted of human resources managers, academic chairs, and deans from the higher education sector who had developed and implemented successful KM strategies. The transfer of knowledge increases productivity, efficiency, innovation, motivation to teach others, and competence and contributes to the competitive advantage of organizations (Argote & Ingram, 2000; Fasbender et al., 2021; Kusumawijaya & Astuti, 2023).

The review of literature included published sources regarding *aging population, aging workforce, falling fertility rates, older workers, talent shortage, shifting demographic trends, shifting retirement norms, lengthening life expectancies, semi-retirement, retiring baby boomers, preparing for an aging workforce, approaches to age related human resource management, employer concerns and responses to an aging workforce, aging population, knowledge transfer, aging employee knowledge transfer, challenges for human resources management, sustaining an aging workforce, aging of*

*faculty, aging managers, aging leaders, silver tsunami, typical retirement ages, strategies for retaining and managing an aging workforce, how are employers responding to an aging workforce, work and retirement, age-diverse workforce, generational theory, age-diversity, flexible ways of managing retirement, offering part-time work to retirees, pandemic and retirement, planned retirement, unplanned retirement, who retired during the pandemic, organizational practices for the aging workforce, presenteeism, productivity loss, and workplace discrimination.* Because the terms *ageing* and *aging* were used in the literature, both versions were used for searching. Literature was accessed through Walden University's online library, Google Scholar, and various sources, including related books, reports, websites, and databases such as Business Source Complete, CINAHL, and APA PsycInfo. Additional keywords included *knowledge transfer, knowledge transfer strategies, knowledge creation, knowledge sharing, tacit and explicit knowledge, knowledge types, knowledge sharing theory, knowledge strategies, retaining business knowledge, succession planning, organizational learning, knowledge management, and knowledge loss.*

### **Conceptual Framework: SECI**

The conceptual framework for this study was based on the SECI model developed by Nonaka (1994) in conjunction with the theory of OKC. The tenets of OKC are tacit and explicit knowledge (Nonaka, 1994). In the SECI model, knowledge is continuously transformed through implicit and explicit forms, thereby creating new knowledge (Nonaka & Konno, 1998; Nonaka et al., 2000). An individual owns tacit knowledge, which is challenging to express, difficult to communicate and share with others, and to

understand and codify (Mardiani et al., 2019). Although it is challenging to share tacit knowledge, employees must share it because the quantity of tacit knowledge is greater than that of explicit knowledge.

Explicit knowledge is technical or information that is described in formal language, such as manuals, mathematical expressions, copyrights, and patents (Smith, 2001). Nonaka and Takeuchi (1995) introduced SECI as an OKC model based on the action and interaction between implicit and explicit knowledge. The OKC framework is applicable for identifying and exploring how knowledge is captured and transferred, allowing it to be retained within an organization.

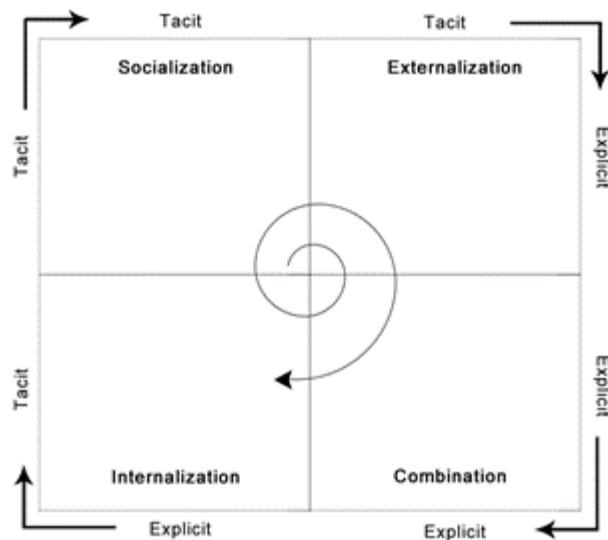
The first dimension in the SECI model is socialization, which involves sharing tacit-to-tacit knowledge. This dimension is the most significant of the four dimensions. SECI was used as a systematic approach to guide the current study's data collection and analysis process (see Almuayqil et al., 2017). Socialization is achieved through direct interactions with customers and internally within organizations, resulting from the sharing of tacit knowledge through personal interactions, which fosters trust and a shared understanding between individuals (Yao et al., 2012). The second dimension is externalization, which involves making tacit knowledge explicit. Through this process, tacit knowledge is converted into new explicit expertise in the form of concepts, images, and written documents, which can be shared with others in the organization (Yao et al., 2012). The third dimension is combination, which is the process of synthesizing and integrating explicit knowledge into more complex and systematic sets of explicit knowledge. This involves organizing, categorizing, and analyzing existing knowledge to

generate new information and perspectives, making it more usable and accessible (Yao et al., 2012). The fourth dimension is internalization, which is the process of converting explicit knowledge into tacit knowledge. When knowledge is internalized, it becomes an individual's tacit knowledge expressed in the form of shared mental models and technical competencies. When tacit knowledge is achieved at the individual level, it can generate new knowledge and contribute to socialization, fostering a shared understanding among individuals (Yao et al., 2012).

Nonaka and Takeuchi's (1995) SECI model was an appropriate framework for the current study because it addresses knowledge transfer within organizational processes, focusing on the conversion of explicit and tacit knowledge. Knowledge transfer and creation contribute to an organization's knowledge-sharing process and its capability to sustain a competitive advantage. Nonaka and Takeuchi's SECI model is a process that blends tacit knowledge and explicit knowledge to form four distinct knowledge designs, as illustrated in Figure 1.

**Figure 1**

*Spiral Evolution of Knowledge Conversion and Creation*



*Note.* Adapted from *The Knowledge-Creating Company*, by I. Nonaka and H. Takeuchi, 1995, p. 71. Copyright 1995 by Oxford University Press.

### **KM in Organizations**

The term “knowledge management” was first introduced by management educators as they became interested in leveraging information and knowledge to inform decision-making (Serenko & Bontis, 2004; Tzortzaki & Mihiotis, 2014). Dalkir (2013) determined the definition of KM was often refined through the author’s view and catalogued over 100 different published definitions of KM. KM is structured to manage information, encompassing knowledge sharing, which includes dissemination, usability, and accessibility; knowledge creation; and knowledge codification, which involves transformation, storage, protection, and representation (Anshari et al., 2022; El-Farr,

2023). Despite the growing interest in KM for higher education, research on this topic remains fragmented and lacks alignment (Quarchioni et al., 2022). KM actualizes value by leveraging intangible assets (Leung et al., 2023).

Canada's higher education institutions' primary goal is to efficiently maintain and transfer knowledge creation to faculty, staff, and students. Effective KM enables organizations to collect, share, and utilize knowledge efficiently across internal departments and with stakeholders (Amoozad Mahdiraji et al., 2022). KM has become a strategic imperative for organizations of all sizes and sectors worldwide, especially in today's global marketplace (Ardito et al., 2022; Del Giudice et al., 2017; Dezi et al., 2019; Nascimento et al., 2021). Effective management and utilization of a company's employee knowledge and skills are critical for long-term success (Suparwadi et al., 2024). KM is a blend of processes that benefit from knowledge-intensive activities to achieve a sustainable competitive advantage. (Manesh et al., 2020).

### **Knowledge Transfer in Organizations**

Knowledge transfer is an organizational process that helps employees successfully transfer knowledge from one source to another within or across stakeholder groups (Szulanski, 1996). For knowledge transfer to occur, employees must share their knowledge with one another while acquiring new knowledge from others to customize and repurpose it (Chen & Hung, 2010). When knowledge is acquired in one situation and applied in another, or when an individual learns from another, and this can be demonstrated through a change in the knowledge; the knowledge transfer process has occurred (Argote et al., 2022). Knowledge transfer processes involve the relation between

tacit and explicit knowledge (Aghazadeh et al., 2023). Tacit knowledge transfer is often evaluated as the process of transferring techniques, knowledge, experience, and ideas from one individual to another (Gegenfurtner et al., 2020; Kim et al., 2019).

Organizational performance improvement and innovation occur through the knowledge transfer process, ultimately creating a competitive advantage (Guo & Chelliah, 2024).

Knowledge transfer extends beyond the individual level, encompassing transfers between groups, departments, and business units (Castro & Moreira, 2023).

A company culture that supports and values knowledge sharing among employees can significantly facilitate the transfer of knowledge within an organization. It has long been understood that high-performing organizations must manage knowledge and strategically build, transform, organize, deploy, use, and transfer knowledge (Wiig, 1993). Knowledge is an organization's most strategic and significant resource and the source of competitive advantage (Alavi et al., 2024; Alavi & Leidner,). Knowledge transfer is based upon an employee's willingness to share knowledge; managers must consider who is selected as a mentor, coach, and trainer to enhance the exchange of knowledge (Cox & Overbey, 2023). To prevent barriers and enhance knowledge transfer, employees should have access to specific mentoring opportunities that build and foster relationships (Cox & Overbey, 2023).

### **Knowledge Transfer Mechanisms**

Effective knowledge transfer is critical to sustaining organizational performance. Knowledge resides not only in individuals but also in tools and tasks across the organization (Argote & Ingram, 2000). Mechanisms for transferring this knowledge can

be formal or informal and include processes for sharing, integrating, interpreting, and applying *know-what*, *know-how*, and *know-why* within teams and across units (Boh, 2007). These mechanisms serve as vehicles for disseminating knowledge, including tools such as personnel movement, social networks, routines, and organizational structures (Argote et al., 2022). The type and design of the knowledge transfer mechanism influence both the efficiency and quality of the knowledge exchanged (Khamaksorn et al., 2017, 2020).

However, several challenges hinder effective knowledge transfer. Employees may be unaware of valuable knowledge or may disregard it if it is not specific to their own organization. In some cases, employees resist sharing knowledge with coworkers due to concerns that doing so may elevate others' perceived status (Menon et al., 2006). Additionally, information is often equated with power, leading individuals to withhold knowledge even when formal systems are in place to encourage its transfer (Connelly et al., 2012). These barriers underscore the need for intentional strategies to foster knowledge-sharing behaviors and overcome organizational resistance.

### **Learning Organizations**

A learning organization is one that actively encourages the continuous learning of all its members while adapting to internal and external demands (Pedler et al., 2005). These organizations embed learning into their operations by offering mentorship programs, collaborative approaches, and structured problem-solving frameworks to promote knowledge transfer as an intentional, ongoing practice rather than an ad hoc activity (Marsick & Watkins, 2003; Senge, 1990). Effective learning organizations

support both individual professional growth and broader organizational development (Kalra et al., 2023). To implement organization-wide learning practices successfully, leaders must ensure these efforts generate meaning and value at all levels of the organization (Park & Joo, 2022).

Higher education institutions operate as learning organizations within a competitive environment that demands continuous adaptation. To maintain a competitive advantage and fulfill their mission to students, employees, and community stakeholders, these institutions must prioritize knowledge transfer and adopt innovative learning strategies (Habtoor et al., 2018). Twenty-first-century learning approaches differ significantly from those of previous generations, particularly with the introduction of artificial intelligence (AI) tools that are reshaping how individuals and systems interact to support organizational learning (Alavi et al., 2024; Kareem et al., 2025).

Two emerging focal points within learning organizations are talent development and digital innovation. Talent management encompasses attracting, developing, and retaining employees, while digital innovation involves acquiring and leveraging technologies to support sustainable business practices (Hassan et al., 2022). As a result, learning organizations increasingly invest in digital platforms to create collaborative environments that enhance knowledge sharing and foster organizational agility (Artüz & Bayraktar, 2021; Fischer & Pöhler, 2018; Hoe, 2019).

### **Organizational Knowledge Loss**

Organizational knowledge loss occurs when experienced employees leave an organization, taking with them specific skills and knowledge that negatively impacts the

remaining employees and stakeholders (Cox & Overbey, 2023). Between 2021 and 2022, the pandemic triggered a Great Resignation that removed millions of workers, regardless of age, from the workforce, including many with valuable experience and knowledge that organizations lost (Faria-e-Castro, 2021; Serenko, 2023). Baby boomers retired in significant numbers, leaving organizational leaders unprepared for the loss of organizational knowledge (Rubin & Sparzo, 2020). Generational attrition in organizations was also on the rise, and organizational loss is more significant when experienced employees in high-priority roles leave with specialized skills and knowledge without succession planning in place (Rubin & Sparzo, 2020). Employee morale was affected by the additional workload placed on remaining employees when established tasks and processes are not documented (Cox & Overbey, 2023).

### **Workforce Reduction**

Workforce reduction, often implemented through layoffs or downsizing, is a common organizational response to financial strain. The COVID-19 pandemic led to global economic disruptions that severely impacted the financial viability of many institutions, resulting in widespread layoffs and significant operational challenges (Lee et al., 2023). Layoffs are frequently used as a strategy to enhance productivity and improve organizational competitiveness during fiscal downturns (Neto & Mullet, 2018).

In Canada, demographic shifts compound these workforce challenges. As of 2021, nearly 20% of the Canadian workforce was nearing retirement age, and the proportion of seniors aged 65 and older is projected to rise from 18.5% in 2021 to 30% by 2068 (Statistics Canada, 2023). Globally, one in six people will be over age 60 by

2030, presenting long-term implications for labor markets and economic sustainability (World Health Organization, 2022). With fewer younger workers entering the labor force, the simultaneous effects of layoffs and retirements threaten continuity of knowledge and workforce capacity.

Recent policy changes have intensified labor concerns in the Canadian higher education sector. For example, in January 2024, the Canadian government announced a cap on international student permit applications, resulting in a 35% decrease in approvals compared to the previous year (Haidar, 2024). This decline in enrollment triggered financial instability across several Ontario colleges, leading to layoffs and increased uncertainty for faculty and staff (Haidar, 2024).

Layoffs affect not only those who exit but also the “survivors” who remain. Research shows that survivors often experience heightened job insecurity, mental health strain, and reduced motivation, especially when they perceive the layoffs as unjust (Cregan et al., 2021; Kivimäki et al., 2000; Vahtera et al., 1997, 2004). To address these effects and maintain continuity, managers must implement targeted knowledge transfer strategies to help remaining employees adapt to expanded responsibilities and redefined roles (Basu et al., 2024).

### **Remote Work and Workforce Retention**

Remote and hybrid work continues to be a significant trend, with hybrid work models becoming increasingly favored. Remote work is defined as a flexible work arrangement that allows employees to do their job from a location other than the workplace (Beno, 2022). Workplaces have shifted from in-office to remote work causing

a shift in workplace dynamics, duties, and hours (Kramer & Kramer, 2020). Remote work has contributed positively to expanding workforce retention strategies (Krull & Rich, 2023). The opportunity for employees to work remotely offers increased flexibility and self-governance, which contributes to greater job satisfaction and employee retention (Gualano et al., 2022).

The shift to remote work has become a key component of many jobs, leading to significant changes impacting knowledge transfer within organizations. To establish and maintain knowledge sharing in a remote work environment, an organization may require a sophisticated knowledge-sharing process (Nwankpa & Roumani, 2024). More recently, organizations have increased investments in digital technologies that have improved knowledge sharing by modernizing communication and collaboration between employees within the organization (Deng et al., 2022; Nguyen et al., 2021).

### **Strategic Workforce Planning**

The 2020s saw change and disruption for societies, economies, and organizations around the globe and many thought the economies would experience a period of post-pandemic recovery in the early 2020s (Pillans, 2024). However, instead, the world experienced several crises, including the war in Ukraine, a cost-of-living crisis, high inflation, and stagnant growth for many businesses and institutions (Pillans, 2024). Significant political changes have also affected jobs, job opportunities, and how organizations operate.

Strategic workforce planning is a process that determines the supply and demand of labor as the needs of an organization shift (Ruf et al., 2022). According to Song and

Huang (2008), strategic workforce planning is comprised of two key tasks:

(a) determining applicable skill types and the need for skilled employees, and (b) developing a capacity plan based on the current workforce and this demand. Strategic workforce planning actions may include recruitment, reskilling, upskilling, investing in automation or robotics, redesigning work, tapping into the contingent workforce or restructuring the workforce (Pillans, 2024).

Higher education employers should consider data-driven workforce planning. Higher education institutions need to understand their labor supply and demand and develop knowledge transfer strategies to retain and develop employees (Haidar, 2024). Knowledge transfer strategies will ensure higher education employers have the right people in the relevant roles at the right time, with the appropriate level of knowledge (Haidar, 2024). Documenting policies and procedures is an essential component of knowledge sharing and knowledge codification. Managers must create knowledge transfer strategies that prioritize the investment of time and resources to maximize the transfer of knowledge from experienced to less experienced employees, thereby sustaining performance (Humrickhouse, 2025). Strategic workforce planning becomes challenging when unexpected resignations lead to capacity shortfalls (Ruf et al., 2022).

### **Management's Role in Overseeing Knowledge Transfer**

Managers lack effective KM strategies to capture and transfer valuable knowledge of experienced employees to less experienced employees to sustain performance and competitive advantage. Managers need strategies to retain valuable employees and transfer knowledge (Rubin & Sparzo, 2020). Managers should foster a culture that

supports succession planning to reduce knowledge gaps through specific on-the-job training, promoting and encouraging knowledge transfer between employees, groups, departments, and business units. Managers should proactively review retirement eligibility reports 2–3 years before retirement-eligible employees retire to ensure that appropriate initiatives can be provided to delay retirement plans for cross-training purposes. Managers should collaborate with subject matter experts to create actionable and sustainable succession plans. When offering incentives to defer retirements, incentive programs should highlight the value the tenured employees bring to the organization (Cox & Overbey, 2023). Managers should consider employee-empowering policies, as these may enhance the success of knowledge transfer initiatives and improve organizational performance and competitive advantage (Cillo et al., 2022).

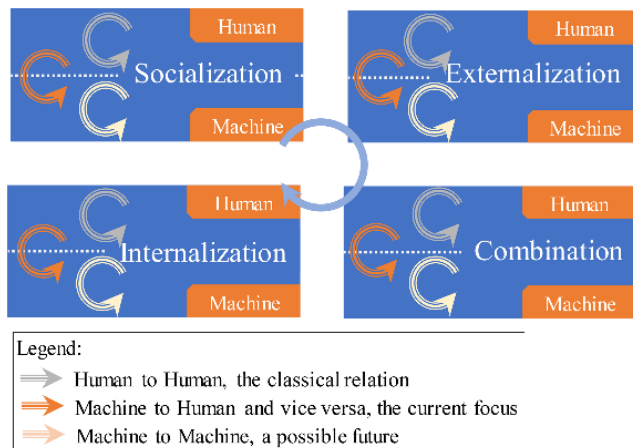
### **KM and Generative AI**

AI has become a partner to KM strategies. KM enables organizations to capture, share, and apply collective knowledge, thereby enhancing performance, fostering innovation, and streamlining decision-making (Boiko et al., 2021; Earl, 2001). As organizations pursue digital transformation and seek competitive advantage in the era of Industry 4.0, the current phase of manufacturing evolution, KM has become a strategic priority (Kaczorowska-Spychalska et al., 2024). Defined as the process of developing, capturing, sharing, and utilizing knowledge, KM supports organizational agility and adaptability (Alavi & Leidner, 2001). Increasingly, AI has emerged as a critical enabler of these KM functions.

Generative AI (GenAI) refers to systems that learn from datasets and create new content such as text, images, or reports (Radford et al., 2021). Unlike traditional rule-based AI, GenAI enhances every stage of the KM cycle, including creation, capture, storage, organization, dissemination, and application (Kaczorowska-Spychalska et al., 2024). GenAI can automate routine tasks, extract new insights from large data sets, and generate content that supports decision-making and innovation. Within academic institutions, where knowledge exchange is core to mission and identity, the integration of GenAI may fundamentally reshape how faculty, staff, and students live, learn, and collaborate.

### **Generative Receptive AI**

With the introduction and application of GenAI models, the further applicability of the SECI framework is not only pertinent to existing KM theory but also to organizations. According to recent research conducted by Böhm and Durst (2025), a proposed revised perspective of the SECI model, known as generative receptive AI (GRAI), is a possible enhancement to the SECI model, as illustrated in Figure 2. Böhm and Durst (2025) posited that the GRAI framework can enhance the explanatory power of the SECI model for knowledge creation and sharing, while also conceptualizing a broader expansion of this model through the integration of GenAI into these knowledge processes.

**Figure 2***GRAI Framework*

*Note.* Extension of the original SECI model with an additional agent layer

(human/machine) and the respective fields of interaction between them, by K. Böhm and S. Durst, 2025, VINE Journal of Information and Knowledge Management Systems.

<https://doi.org/10.1108/VJIKMS-10-2024-0357>

The revised SECI model describes the machine as a participant that can play an active or a passive role. The active role creates an output or response, whereas the passive role is akin to listening and adapting/rebuilding the internal knowledge representation (Böhm & Durst, 2025). The four areas (socialization, externalization, combination, and internalization) of the SECI model would each be divided into a human perspective and a machine perspective, resulting in eight fields of action in the new model, as shown in Figure 2 (Böhm & Durst, 2025). In the current development stage of GenAI, the most captivating areas are those in which humans and machines interact with each other between the different stages. Böhm and Durst (2025) recommend that GRAI should be

explored further in different organizational contexts and that there is a need for studies that investigate how people react to the new generative AI actor.

### **Transition**

Knowledge transfer strategies in higher education are critical for retaining important business-critical information. Section 1 outlined the study's purpose, the business problem, and relevant research literature on concepts associated with knowledge transfer and its influence on retaining business-critical knowledge. The scope of the literature review included the SECI model, KM in organizations, knowledge transfer in organizations, organizational knowledge loss, management's role in overseeing knowledge transfer, KM, and generative AI. In Section 2, I described the research method and design, the data collection process, the data analysis employed, and the methods used to ensure data reliability and validity. In Section 3, I addressed project ethics, nature of the project, population, sampling, participants, data collection, interview questions, data organization and analysis techniques, reliability, and validity. Moving forward, Section 4 presents the findings, business contributions, and recommendations for professional practice, implications for social change, suggestions for further research, and a conclusion.

### Section 3: Research Project Methodology

Section 3 outlines the key elements necessary for the qualitative pragmatic inquiry methodology. These elements include the project ethics, the nature of the project, and the sampling plan and scope. Section 3 also includes data collection activities, interview questions, data organization and analysis techniques to ensure the study's reliability and validity, culminating with the transition and summary.

#### **Project Ethics**

My role as the researcher for this business research project was to gather relevant data to answer the research question of my study. The responsibility for the ethical integrity of a study lies with the researcher, and if ethics are compromised, the data quality for the business research project is at risk (Taquette & Borges da Matta Souza, 2022). I oversaw every aspect of the research process to prevent errors and ensure the quality of the research, including conducting interviews with participants, gathering data from them, and analyzing the collected data to answer the research question (see Busetto et al., 2020; Mwita, 2022). My data collection methods included gathering information through semistructured interviews with human resources managers, academic chairs, and deans from higher education who had developed and implemented successful KM and transfer strategies. As a former administrator at a Canadian higher education institution, I had professional networks that provided me with access to individuals who met the selection criteria for my study. I also reviewed relevant publicly accessible documents as a secondary data source. Documents included strategic plans, annual reports, and accountability statements.

Qualitative researchers interact directly with research participants, collect and analyze data, and interpret the obtained information (Collins & Stockton, 2022). Because my study involved human participants, I adhered to the guiding ethical principles outlined in *The Belmont Report*. *The Belmont Report* requires that all researchers clearly define the study's purpose, specifying whether it constitutes established practice or is part of biomedical or behavioral research (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979). According to *The Belmont Report*, I ensured that each participant was respected, treated with beneficence, understood the business research project, and provided with comprehensive, informed consent to participate. The informed consent process provided participants with key details concerning the project's purpose, procedures, potential risks, and benefits. Informed consent helped ensure that participants understood the parameters and methods of the research project before they decided about whether to participate.

Before collecting data, I obtained approval from the Walden Institutional Review Board (approval number 08-04-25-0514793) to ensure compliance with ethical research protocols. My personal commitment to ethical integrity guided all aspects of this research, from participant selection to data collection and reporting of findings. Participants could withdraw from the study at any time before the final analysis portion had been created, without penalty, by notifying me by phone or email, and any information on file provided by the participant would be destroyed (see Office for Human Research Protections, 2014; U.S. Department of Health and Human Services, 2018). No incentives were provided to prevent any undue influence on participants' decisions to

participate in the study. The decision to offer incentives should be thoughtfully considered and positioned in accordance with ethical principles (Barry et al., 2022). The privacy and confidentiality of the participants were of the utmost concern. I will securely store all collected data for a minimum of 5 years in a password-protected digital repository (see Office for Human Research Protections, 2014; U.S. Department of Health and Human Services, 2018). The final manuscript excluded names or identifiable information of individuals or organizations to maintain confidentiality and adhere to ethical research standards.

### **Nature of the Project**

I selected a qualitative research method with a pragmatic inquiry design to answer the research question for this business research project: What strategies do some Canadian higher education managers use to capture and transfer experienced employees' knowledge to sustain performance? A qualitative approach was appropriate for this study because it facilitated a comprehensive exploration of the lived experiences, perceptions, and strategies of managers navigating economic volatility and shifting workforce demographics while developing effective knowledge transfer strategies (see Creswell & Creswell, 2018). Qualitative methodology is effective for understanding phenomena within their natural contexts and exploring "how" and "why" questions (Creswell & Poth, 2018).

Within the qualitative methodology, a pragmatic inquiry approach was employed to organize the data collection and analysis process. The pragmatic inquiry research design was appropriate because it highlighted actionable and practical outcomes,

enabling the identification and exploration of successful strategies used by some Canadian higher education managers to capture and transfer knowledge (see Morgan, 2014). I selected pragmatic inquiry for the research design because this approach permitted me to interview human resources managers, academic chairs, and deans for detailed information regarding their experiences with successful KM and transfer strategies. I identified and explored more detailed information by collecting data on the participants' successful strategies for capturing and transferring knowledge from experienced employees to less experienced employees, to sustain performance.

### **Population, Sampling, and Participants**

The population for the study consisted of Canadian human resources and higher education managers in the academic sector who had employed effective strategies to capture and transfer the valuable knowledge of experienced employees to less experienced employees, thereby sustaining performance. The human resources and higher education managers who met the study's selection criteria were identified and contacted through professional networks, LinkedIn, and academic associations (see Wong et al., 2021). Purposeful sampling ensured individuals met the eligibility criteria: (a) currently employed as a human resources manager or higher education manager in an academic setting, (b) a minimum of 3 years of managerial experience, (c) direct oversight of staff, and (d) self-identified as effectively implementing strategies to capture and transfer experienced employees' knowledge to sustain organizational performance. Purposeful sampling allowed the appropriate group to participate in the study (see Connor & Corcoran, 2022). Individuals who met the criteria were contacted by email to

determine their participation in the study. I followed Aphane et al.'s (2020) advice when communicating with participants, in that I was professional, on time, transparent, and willing to answer all the participants' questions regarding the study, thereby building rapport and trust.

### **Data Collection Activities**

The primary data collection instrument was semistructured interviews. Semistructured interviews are a standard data collection method for addressing lived experiences and applied strategies (Squire et al., 2024). When collecting data, I used two data types to ensure triangulation: (a) semistructured interviews and (b) publicly available documents. An interview protocol was used to ensure each participant's experience was consistently explored. The protocol included an introduction to the study, which outlined participant consent and the process for withdrawal, an opening statement, a predetermined list of interview questions, methods for ensuring confidentiality and privacy, and a conclusion that summarized the interview and expressed gratitude to participants for their time investment.

Following approval from Walden University's IRB, I began the data collection process. I leveraged the Zoom teleconferencing platform to conduct and audio-record the interviews. Digital recording the interviews helped control researcher bias and enhanced the data verification process (see Rutakumwa et al., 2020). The interviews were scheduled for 30 to 45 minutes, providing participants with sufficient time to explain their strategies for capturing and transferring experienced employees' knowledge to sustain organizational performance.

Each interview was transcribed and included member checking. Member checking is a technique used in qualitative research to enhance the trustworthiness of findings by sharing research results with participants who provided data (Birt et al., 2016). Participants had the opportunity to verify the accuracy of the researcher's understanding of the information obtained and provide additional context related to the data if needed. Researchers can strengthen the reliability and validity of their data analysis by verifying that the transcripts accurately represent the participants' contributions (Birt et al., 2016; Price & Smith, 2021).

### **Interview Questions**

1. What KM tools do you use in your institution?
2. What strategies have you used in your institution to capture and transfer valuable knowledge of experienced employees to less experienced employees to sustain performance?
3. How did you determine the effectiveness of the strategies used in your institution to capture and transfer valuable knowledge of experienced employees to less experienced employees?
4. What strategies did you find worked best to capture and transfer knowledge between employees?
5. What was the most effective strategy used in your institution to capture and transfer knowledge?
6. What key challenges did you face in implementing these knowledge capture and transfer strategies?

7. How have your institution's knowledge capture and transfer strategies contributed to sustaining performance?
8. What role does management play in the implementation of knowledge capture and transfer in your institution?
9. How was technology leveraged to enhance knowledge capture and transfer?
10. How have you integrated AI with knowledge capture and transfer strategies in your institution?
11. What additional information would you like to share regarding knowledge capture and transfer strategies to sustain performance?

### **Data Organization and Analysis Techniques**

The appropriate data analysis for this qualitative pragmatic inquiry was thematic analysis. Thematic analysis is a data analysis method that identifies, analyzes, and reports patterns or themes within collected data, providing a flexible and detailed summary of the data (Braun & Clarke, 2022). The principle of thematic analysis involves a coding system developed by the researcher, which correlates the data with specific codes. Each participant was assigned a specific code.

Microsoft Office Excel was used to track, synthesize, and store the data collected from participants. Notes were created alongside audio recordings of the interviews, which included transcripts in individual Word documents, along with coding and identification of themes. Each participant's interview was cataloged in a file along with the researcher's reflective journal. I used reflective journaling to mitigate bias.

I also used triangulation in the data analysis. Triangulation also enhances credibility and validity (Donkoh & Mensah, 2023). Researchers are accountable for analyzing and interpreting all collected data. Triangulation involves comparing multiple data sources to assess credibility (Pyo et al., 2023). Using thematic analysis, purposeful sampling, triangulation, and member checking, the researcher acquired the information needed to identify, analyze, and categorize themes.

All data collected for this study were stored in a specified folder on a password-protected laptop with a Universal Serial Bus (USB) drive backup. The USB drive and all physical documentation were stored in a locked filing cabinet at the researcher's home that is only accessible by the researcher. All data, including physical documentation and references, were stored in a digital file. All data related to this study will be maintained and secured for 5 years from the study's completion date and then subsequently destroyed.

## **Reliability and Validity**

### **Reliability**

Reliability and validity are fundamental components of qualitative research (Yin, 2018). Reliability refers to the consistency and dependability of the research process, while validity pertains to the credibility and accuracy of the findings (Price & Smith, 2021). Data reliability is integral, as errors can impact the study's credibility. Reliability is concerned with the measures related to the research instrument and methodology, and validity is based on the accuracy and truthfulness of the data interpretation and findings

(Pham et al., 2024). Credibility, transferability, dependability, and confirmability significantly reinforce research reliability (Amin et al., 2020).

In the framework of qualitative pragmatic inquiry, dependability ensures that if the systematic process is repeated under the same conditions, it will achieve the same outcome. Researchers who apply the following strategies will ensure dependability: (a) audit trail, (b) code-recode strategy, (c) peer examination, (d) triangulation, (e) reflexive journal, and (f) member checking (Nolan-Cody et al., 2024). Member checking was employed in the study to enhance reliability and maintain study accuracy by validating the data collected through participant interviews (Candela, 2019; Degeling & Rock, 2020). Utilizing strategies to ensure the dependability of qualitative research confirms that the findings are consistent and reliable over time (Naeem et al., 2023).

### **Validity**

Strengthening the validity of a study requires triangulation of data sources (Yin, 2018). When collecting data for this study, several methods were used to ensure triangulation: (a) semistructured interviews and (b) publicly available documents. Triangulation in the data analysis will further strengthen the credibility and validity of the study (Donkoh & Mensah, 2023). Member checking was employed in the study as a method to validate the data collected from participants, thereby strengthening trust in the research outcomes and mitigating researcher bias (Lemon & Hayes, 2020).

### **Credibility**

Credibility is established through the alignment of data with the primary research question (Stahl & King, 2020). The data from the interviews were validated against the

research question to ensure the data were credible. Member checking also ensures credibility and validity in qualitative research (Braun & Clarke, 2022; Morse, 2015). Member checking was employed in the study to enhance credibility.

### **Transferability**

Transferability enables the reader to evaluate whether the study's findings can be applied to different contexts beyond the original study (Muzari et al., 2022). An interview protocol was employed in the study to collect data, ensuring transferability.

Transferability links the research findings to a range of disciplines (Coleman, 2022; N. Singh et al., 2021).

### **Confirmability**

Confirmability refers to the extent to which other researchers can confirm the interpretations and conclusions formed by the researcher (Nassaji, 2020). Researchers use member checking to ensure confirmability (Braun & Clarke, 2022). The use of verbatim recordings to create transcripts of what participants stated during interviews leads to confirmability, especially when valid member checking processes also occur. This study used both member checking and verbatim transcripts of interview data.

### **Data Saturation**

Data saturation occurs when additional data collection no longer produces new insights or themes (Farquhar et al., 2020; Hennink & Kaiser, 2022). When researchers can no longer uncover new information within the data, they have achieved data saturation (Yin, 2018). When the researcher has fully collected data to address their research objectives and no longer discovers themes or codes, the research has reached a

saturation point (Hennink & Kaiser, 2022). Data saturation and triangulation are important characteristics of qualitative research methodology that enhance the credibility and validity of the research findings.

### **Transition and Summary**

In Section 3, I described the research study methodology, project ethics, the nature of the project, the population, sampling, and participants. Section 3 also included data collection activities, interview questions, data organization, and analysis techniques. I described how I addressed reliability and validity. In Section 4, I analyze and discuss the study's findings. I identify contributions and recommendations based on the study's findings and implications for social change, as well as recommendations for future research.

## Section 4: Findings and Conclusions

### **Presentation of the Findings**

The overarching purpose of this qualitative, pragmatic inquiry study was to identify and explore successful strategies employed by some Canadian higher education managers to capture and transfer the knowledge of experienced employees, thereby sustaining performance. To answer the research question, I conducted semistructured interviews with eight academic managers from higher education with at least 3 years of successful experience in developing and implementing successful KM and transfer strategies. Originally, I chose a sample of six participants; however, two additional participants were invited to participate in the study who met the selection criteria. Other data sources included publicly available organizational documents, including institutional strategic plans, business plans, annual reports, accountability statements, and strategic announcements.

The appropriate data analysis for this qualitative pragmatic inquiry was thematic analysis. Thematic analysis is a data analysis method that identifies, analyzes, and reports patterns or themes within collected data (Braun & Clarke, 2022). I developed a coding system that associated the research data with specific codes. The coding process identified keywords and common phrases from the interview transcripts and organizational documents. I used character codes (P1, P2, P3, P4, P5, P6, P7, and P8) to identify the participants. The participants responded to 11 questions that explored the successful strategies employed by some Canadian higher education managers to capture and transfer the knowledge of experienced employees, thereby sustaining performance.

Upon completing the interviews, I conducted member checking and triangulation by transcribing the audio files into transcripts, manually coding and summarizing the interview data and company documents, and using Microsoft Word and Microsoft Excel to compile the qualitative data and identify themes, thereby testing the data's credibility. I reviewed my themes against the research in my literature review and the conceptual framework to ensure the study's reliability. The linkage of the OKC theory concepts was evident in the discussion of explicit and tacit knowledge capture and transfer.

Analysis of the data revealed three emerging themes: knowledge-sharing culture, mentoring and coaching, and technology adoption. Section 4 presents a description of the emerging themes, confirming my findings and extending knowledge in the discipline by comparing them with other peer-reviewed studies from my literature review. I then link the findings to the conceptual framework to ensure the study's reliability. The findings, along with the applicable themes, applications to professional practice, and implications for social change, are also presented. Additionally, recommendations for action and further research, along with a conclusion, are presented.

### **Theme 1: Strategies for Creating a Knowledge-Sharing Culture**

Theme 1, knowledge-sharing culture, focused on shared values, beliefs, and behaviors that define an institution and guide how its managers and staff interact and behave with one another. Effective managers encourage employee buy-in, identify key knowledge holders, and employ a combination of methods, such as job shadowing and written documentation, to capture and transfer both explicit and tacit knowledge. The findings from this theme included two subthemes, which were tenets of the OKC theory:

(a) explicit knowledge and (b) tacit knowledge. P4, P5, and P8 shared that their institutions maintain written documents, reports, and standard operating procedures to facilitate effective knowledge transfer among employees. P4, P5, and P8 further indicated that this type of knowledge transfer converts tacit, individual knowledge into explicit, institutional knowledge. Explicit knowledge is technical or information that is described in formal language, such as manuals, mathematical expressions, copyrights, and patents (Smith, 2001). Tacit knowledge refers to knowledge that is not easily described or shared, and it can take the form of experience, expertise, and knowledge that each employee possesses (Wiyono et al., 2025).

Job shadowing is an on-the-job learning method that offers an employee a unique opportunity to observe another colleague's daily duties and interactions, facilitating knowledge transfer. This process promotes the transfer of both explicit knowledge (technical information related to job duties and responsibilities) and tacit knowledge (unspoken knowledge that resides in a person's head) to newer or inexperienced employees (Huie et al., 2020). Job shadowing is a valuable on-the-job learning method that shares institutional knowledge, enhances connections among employees, and improves cross-functional collaboration (Cox & Overbey, 2023). Job shadowing also ensures that company documents are updated to reflect changes in job duties, responsibilities, and the overall workflow.

A standard operating procedure defines a set of steps that a person or group must follow to complete a job, clearly defining who does what, where, how, and why (Amare, 2012). Standard operating procedures are employed to conduct routine operations that

aim to achieve efficiency, high-quality output, and optimal performance (Baksanskaite et al., 2025). Moreover, a standard operating procedure often serves as a training manual, transferring explicit and tacit knowledge through clear, step-by-step instructions to employees.

Empowering managers provides a means to encourage new behaviors and decision-making skills that can impact an institution's sustainable performance (Pett et al., 2025). P2, P3, P6, and P7 reported that managers set the tone at the top and contributed to shaping the institution's culture and behavioral expectations. Effective managers foster a culture of knowledge sharing by encouraging employees to share information as part of daily workflows. Organizational culture, comprising shared values, beliefs, and norms within the organizational fabric (Isensee et al., 2020), plays a key role in encouraging knowledge sharing among employees. Organizational culture is the basis on which trust and collaboration become strong catalysts for strengthening the culture of knowledge sharing within the institution (Akbar et al., 2025).

My analysis of company documents (institutional annual reports) and review of the participants' responses indicated that all institutions had institutional values to guide and shape a positive work culture. P1's and P7's institutional values centered around collaboration and innovation. P2's and P8's institutional values focused on learning and fostering a positive and supportive workplace. P3's institutional values were rooted in creating a welcoming, supportive, inclusive environment. P4's institutional values were similar to those of P1 and P2, focusing on employee collaboration and creating a supportive work environment. P5's institutional values highlighted the importance of

building and fostering collegial relationships. P6's institutional values centered around transparency, cooperation, and unity. Institutional values help employees prioritize performance goals and develop a sense of belonging that can contribute to enhanced productivity and employee retention. The effectiveness of organizational knowledge transfer is shaped by critical factors within the organization, including institutional culture, work processes, and information technology (Rhodes et al., 2008).

Knowledge transfer contributes to and enhances an institution's culture by facilitating the free exchange of ideas among employees and providing opportunities for them to learn from one another (Easterby-Smith et al., 2008). P2, P3, P6, P7, and P8 mentioned that staff meetings, employee huddles, one-on-one meetings, and group touchpoints are valuable for exchanging ideas and transferring knowledge between employees. Not all institutions cultivate shared learning, and some actively prevent it due to a culture of command and control, also known as a top-down strategy, where information and knowledge are shared on an as-needed basis (Sturmberg, 2023). Empowering managers create a climate of trust that fosters knowledge transfer (Oliver & Reddy Kandadi, 2006). Some managers incorporate knowledge-sharing moments into team meetings and integrate documentation and information exchange into the onboarding and offboarding processes. P1, P2, P3, P6, and P7 reported that regular monthly staff meetings can serve as both formal and informal platforms for employees to share knowledge and expertise. Formal meetings are generally more structured, with clear agendas, detailed minutes, and guest speakers, while informal meetings are typically more casual and collaborative, fostering a sense of trust among employees.

Onboarding is a structured process that integrates new hires into the institution by providing them with knowledge, tools, learning modules, and cultural understanding, enabling them to become fully integrated and effective in their roles (Alexander, 2023; Dewey, 2023). P4 disclosed that their institution provides onboarding handbooks for new employees as well as an enhanced orientation process through online modules to support their transition and integration into the institution and academic sector. Detailed employee handbooks and collective agreements provide information on a range of employment topics, including professional development. P5 mentioned how valuable onboarding programs are for introducing and reinforcing institutional values and norms to new employees. P5 further added that onboarding programs are important for sharing institutional knowledge and establishing social connections with managers and peers who can share implicit knowledge.

Offboarding is the process of managing an employee's departure from the institution, ensuring a smooth transition for both the employee and the institution (Dewey, 2023). When employees leave the institution, having effective offboarding processes in place ensures a seamless transition and provides an opportunity to capture the work they have done and the institutional knowledge they possess. P2 and P4 emphasized the importance of offboarding when a tenured staff member leaves the institution, as it ensures a smooth transition of work and enables knowledge transfer to those who remain. Knowledge continuity is the process of capturing knowledge of current employees before they exit their department and making it available to their successors and to other members of the institution (Biron et al., 2023).

## **Theme 2: Effective Mentoring and Coaching Strategies**

Theme 2, mentoring and coaching, supports knowledge transfer by transferring organizational, job-specific, and tacit knowledge through direct interaction, practical experience, and guidance. P2, P3, P5, P6, P7, and P8 reported that mentoring and coaching among employees fostered an environment that facilitated the sharing of tacit knowledge. Mentoring is a 5000-year-old tradition, and the literature on mentoring did not become prevalent until the late 1970s (Barinua & Ibe, 2022). Although they are sometimes used interchangeably, mentoring and coaching have distinct objectives. Informal mentoring is a relationship between two people that they freely develop, often as a self-initiated approach, which does not follow the structure of a formal program. This type of mentoring can occur naturally at work and often evolves from shared interests or personal connections among employees (Tahir et al., 2025). P2 stated that it is essential for employees to work together and seek opportunities to support one another and share knowledge. Formal mentoring is organizationally supported and structured, consisting of regular meetings, an established agenda and duration, and clearly defined objectives and metrics (Allen et al., 2006; Tahir et al., 2025). P2 and P5 discussed the importance of mentorship programs being supported by senior management, with a commitment to allocating resources. Additionally, P5 noted that formal mentoring should include clearly defined objectives, metrics, and development plans, given the significant investment of resources. P2 disclosed that their institution supports managers in establishing expectations for meetings and committees to enhance their effectiveness in working together. P2 further said that their institution designs tools and offers facilitation plans to

support effective meetings and conversations. P2 highlighted that at their institution, managers are expected to engage in regular, open, and ongoing conversations with each team member throughout the performance year. These discussions are essential for fostering growth, alignment, and employee engagement.

Peer mentoring is a reciprocal relationship where two individuals with similar levels of experience support each other's growth through a mutual exchange of knowledge, skills, and guidance (Chapman & Collins, 2009; Le et al., 2024). Mentoring enhances employees' understanding of the institution, its climate and culture, power centers, and politics (Barinua & Ibe, 2022). Mentoring is one of the most helpful and practical tools for knowledge transfer and skill development (Barnett et al., 2017; Marshall & Phelps Davidson, 2016). Mentoring is a learning activity in which a trusted colleague (mentor) shares insights, skills, and knowledge with a less experienced colleague (mentee). P3 discussed the importance of the mentor being motivated and willing to transfer knowledge. P3 further shared that a lack of interest on the part of the mentor can sabotage the mentoring relationship, thereby impacting the effectiveness of knowledge transfer to the mentee.

Mentors and mentees must be equally engaged. Mentoring is unique in providing employees with higher-quality knowledge and information about the institution's mission, objectives, and critical institutional knowledge (Al-Zoubi et al., 2025; DuBois et al., 2002;). Mentoring is a comprehensive business strategy that leverages the knowledge of more experienced employees to support those who are new to the institution or less experienced (Barinua & Ibe, 2022).

P6 mentioned the value of having a senior employee mentor a more junior employee (mentee), as the senior employee has experience with the institution and can transfer valuable institutional knowledge to the mentee. Mentoring relationships can be facilitated through one-on-one sessions or group workshops. According to P8, a one-on-one mentoring relationship fosters a deep bond that is less effective in a group setting. P8 further stated that one-on-one mentoring establishes a foundation of trust between the mentor and mentee, thereby strengthening the quality of knowledge transfer. Knowledge-sharing behavior, a key component of organizational effectiveness, involves the exchange of information, skills, and expertise among employees (Jeong et al., 2024).

The goal of knowledge sharing is to promote continuous learning and innovation, enabling organizations to leverage their knowledge assets and sustain performance (Mahdi et al., 2019). P3 asserted that institutional performance is better when teams share and transfer knowledge freely between team members. Mentoring enhances knowledge transfer by accelerating the acquisition of skills and tacit knowledge, thereby improving overall performance. Researchers have demonstrated that mentoring functions have a significant impact on the transfer of tacit knowledge (Al-Zoubi et al., 2020; Xu et al., 2022). Tacit knowledge transfer involves sharing and learning that can be challenging to articulate, as it is often based on individual experiences, insights, and intuitions (Kucharska & Erickson, 2023). Mentoring is an effective method for transferring “know-how” and proactively identifying knowledge gaps. Impactful mentoring programs train mentors and mentees to have fruitful conversations and meetings. P2, P3, P6, and P7 emphasized the value of job shadowing, as it often serves as the starting point for

knowledge transfer between employees; however, it also facilitates a longer-term mentoring relationship if trust and mutual respect are established. Mentoring roles are essential tools for promoting knowledge exchange and development within institutions (Baruch & Sullivan, 2022). Ultimately, mentoring enhances the organization by fostering a culture that encourages knowledge sharing (Barinua & Ibe, 2022).

Managerial or supervisory coaching involves managers serving as coaches and engaging in developmental behaviors to assist employees in gaining and/or enhancing new knowledge and skills, thereby improving overall job performance (Ellinger, 2013; Ellinger et al., 2003). According to Heslin et al. (2006), managerial coaching comprises three foundational dimensions: guidance (confirming performance expectations and providing constructive feedback), facilitation (offering advice), and inspiration (inspiring employees to learn and grow). P1 stated that it is important to provide coaching through the lens of a trusted confidant, guiding the employee and offering constructive feedback at the appropriate time. Such leadership behaviors build trust and encourage employees to learn and grow.

Coaching managers not only actively transfer their own knowledge to support subordinates in developing existing and new competencies (Zheng et al., 2022) but also act as knowledge brokers to help subordinates source knowledge from other areas of the institution (Nyfoudi et al., 2022). P1 and P5 specifically emphasized that the role of a knowledge coach in their institution serves as a knowledge broker, assisting employees in seeking and sourcing knowledge from other areas of the institution. Daily managerial coaching has a positive influence on employees' daily knowledge sharing (Li et al.,

2022). P1 and P5 also highlighted that effective managers guide and influence employees to transfer knowledge to other team members.

Peer coaching is a process in which employees with similar work experience meet to share ideas, offer support, or transfer knowledge to improve skills and job performance. Peer coaching is a two-way relationship in which participants engage freely with one another, receive feedback, and transfer knowledge for personal growth. Peer coaching can be between two employees or involve small groups working together to share best practices and transfer knowledge, thereby developing new abilities to enhance their core and technical competencies (Arslan & Ilin, 2013). P1 and P7 disclosed that their institutions offer one-on-one coaching that helps employees align their strengths with professional goals through a confidential, customized approach.

In contrast to mentoring, peer coaching is based on mutual trust and power sharing (Diaz-Maggioli, 2004). Power sharing is mainly described in literature as occurring between first-line managers and employees (Vroom, 2003). Power sharing redefines knowledge transfer, shifting it from individual dominance to a collective resource. This shift in mindset moves knowledge transfer from 'knowledge is power' to 'sharing is power,' which in turn supports collaboration and mutual employee growth. P6 mentioned that knowledge is power, and there is a right time to share knowledge to promote and encourage knowledge transfer. Also, P6 further stated that managers must serve as role models and demonstrate how power sharing is effective with employees. In peer coaching, the partners should collaborate, share coaching responsibilities, and support one another in their professional growth (Fry & Hin, 2006).

Institutions that foster a culture of learning and provide mentoring and coaching programs for knowledge transfer encourage employees to share knowledge openly, which becomes the only source of sustainable competitive advantage (Schiuma et al., 2012). P7 disclosed that their institution has recently created a new role and title: the Knowledge Transfer and Exchange Coordinator. The Knowledge Transfer and Exchange Coordinator plays a pivotal role in fostering relationships and establishing new partnerships, facilitating knowledge transfer and exchange, and engaging with internal and external partners to sustain optimal performance.

The eight participants directed me to their institutions' public websites to retrieve information about institutional policies, practices, and announcements related to their institution's commitment to professional development initiatives and structured training programs. My analysis of institutional documents revealed that P1 and P2 facilitate employee knowledge transfer through various training programs and resources, including free online materials and department-specific professional development initiatives. P2 offers a range of programs to support skill development and professional growth. P3 and P7 offer training programs to improve employees' core and technical competencies. P4 uses a competency framework for enhancing skills and knowledge and offers online modules to support new hires. P5 facilitates employee knowledge transfer through professional development offerings, combining formal training and on-the-job learning. Professional development includes initiatives such as seminars, workshops, mentoring, observations, peer collaboration, and custom training workshops. Continuing professional development ensures that individuals' skills and knowledge are aligned with the current

needs of their employer and occupation (Abbas et al., 2024). All participants stated that their professional development initiatives greatly benefit their employees and institutions while supporting tacit knowledge-sharing strategies both directly and indirectly.

### **Theme 3: Strategies for Technology Adoption**

In the fast-paced, technology-driven society, institutions are undergoing a profound shift in how people communicate, access, and transfer knowledge, as well as conduct business. The rapid development of information technology has changed the way organizations function. KM can be organized into three themes: people, process, and technology (Wiyono et al., 2025). People are the source of knowledge because they possess, share, and utilize knowledge (Wiyono et al., 2025). Process refers to the storage, sharing, and use of knowledge (Wiyono et al., 2025). Technology incorporates the use of technological devices to facilitate KM (Wiyono et al., 2025). Knowledge is a combination of information and know-how; it is a key resource for an institution's innovative capabilities (Kogut & Zander, 1992). Institutions face challenges in transferring knowledge and implementing strategies, such as offering incentives to encourage knowledge transfer, initiating initiatives to foster a knowledge-sharing culture, and investing in information technology solutions to facilitate knowledge transfer and storage (Standaert & Andries, 2026).

P1 disclosed that their institution relies heavily on a research information system, which is a software platform to manage research-related knowledge and data. It acts as a central repository for publications and ongoing research. Not all employees have access to the system due to cost limitations associated with the subscription. Software licenses

are assigned to key research personnel, who have access to both the explicit and tacit research knowledge stored in the data.

All study participants (P1, P2, P3, P4, P5, P6, P7, and P8) reported that their institutions have adopted the modern Microsoft 365 subscription service, which includes both Office applications (Word, Excel, and PowerPoint) and cloud services such as SharePoint, Teams, and OneDrive. Microsoft SharePoint provides various functions, including saving, structuring, sharing, and accessing information, and thus serves as a comprehensive tool for document management, intranets, and process automation (Bilek, 2025). SharePoint is a secure platform for storing, organizing, sharing, and accessing information from any device. SharePoint helps organizations share and manage content, knowledge, and applications to empower teamwork, quickly find information, and seamlessly collaborate across the institution.

Each participant was asked the following questions: (1) What KM tools do you use in your institution? (2) What strategies did you find worked best to capture and transfer knowledge between employees? Moreover, (3) How was technology leveraged to enhance knowledge capture and transfer? All participants mentioned SharePoint as the optimal technology tool in their institution at the current time. SharePoint transfers knowledge by serving as a central hub for storing, organizing, and sharing information through features such as document libraries, sites, and intranets. All participants (P1, P2, P3, P4, P5, P6, P7, and P8) acknowledged the value SharePoint provides to their institution and their teams. SharePoint provides a robust base technology for a KM system that supports collections of knowledge and document automation. All participants

(P1, P2, P3, P4, P5, P6, P7, and P8) commented on the flexibility and scalability of SharePoint to support various KM-related activities within their institutions. All participants (P1, P2, P3, P4, P5, P6, P7, and P8) viewed SharePoint as an effective knowledge repository for storing knowledge. SharePoint enables employees to access data and collaborate from multiple locations (their homes, offices, satellite offices, coffee shops, etc.).

P2, P4, P6, and P8 all disclosed that their institutions utilize a learning management system. A learning management system is a software application used by academic institutions to create, deliver, and manage online learning activities. P3 disclosed that their institution uses an intranet to support knowledge transfer. An intranet can be an advantageous and appropriate solution for transferring technical knowledge (Mateo et al., 2011). P3 also disclosed that their institution uses digital notebooks instead of binders and written documents.

Schools, as educational institutions, need to continually change and develop in response to the ever-evolving technological demands. Canada's higher education institutions play a critical role in fostering innovation, serving as centers of knowledge creation and dissemination. Canadian post-secondary institutions should consider and embrace the latest AI tools. GenAI refers to a class of AI systems capable of generating original content across different modalities. GenAI is positioned to create value for students, faculty, and administrators. Using GenAI, learning can be more accessible and tailored to a student's specific needs. It can help educators generate high-quality educational content more efficiently. GenAI can also support administrators to operate

more sustainable and efficient campuses by augmenting course scheduling, staff workloads, and overall facility usage.

P3, P4, P6, P7, and P8 have not integrated AI into their institutions' knowledge capture and transfer strategies. P2 disclosed that their institution utilizes an AI-powered risk and compliance software. The software is used to identify, assess, and mitigate risks across the institution. P2 disclosed that their institution is currently exploring AI capabilities related to knowledge capture and transfer strategies. P5 disclosed that their institution developed a proprietary chatbot that offers dedicated support and pre-configured institutional responses. The chatbot's release is in the pilot stage. The year 2025 is within the Post-Industrial Era, heavily reliant on information and technology, and marked by cutting-edge innovations such as AI.

My analysis of institutional documents (annual business plans and strategic announcements) and review of participants' responses indicated that the higher education sector is experiencing a technological disruption, a trend that was accelerated by the COVID-19 pandemic. Factors like the rise of AI and digital learning drive this disruption. P2 is investing in a new student information system to enhance the student experience through a more robust online environment. P3 and P7 have initiated an enterprise resource planning (ERP) project to replace their human resources, finance, and student information systems platforms. P3 and P7 also introduced CoPilot earlier this year for students, a Microsoft AI-powered productivity tool that assists users with various tasks, such as summarizing documents and analyzing data. P4 has been focused on improving

connectivity through extensive investments in telephony and Wi-Fi upgrades. P5 made a significant investment in opening a technology center to enhance students' learning.

### **Findings Tied to Literature Review**

The peer-reviewed studies presented in the literature review align with the themes that emerged from the data analysis and data collected from (a) semistructured interviews, (b) strategic plans, (c) annual reports, and (d) accountability statements. The themes emerging included (a) knowledge sharing culture, (b) mentoring and coaching, and (c) technology adoption. The structure and focus of the literature review for this study are aligned with these themes.

#### ***Theme 1: Strategies for Creating a Knowledge-Sharing Culture***

The findings confirmed that a knowledge-sharing culture is one of the most critical factors for effective knowledge transfer among employees. A learning culture that supports and values knowledge sharing among employees can significantly improve individual and organizational performance. High-performing institutions embed learning into their operations by offering mentorship programs, job shadowing, collaborative approaches, and frameworks that promote the transfer of both explicit and tacit knowledge (Marsick & Watkins, 2003; Senge, 1990). Managers must foster a culture that supports knowledge transfer through employee development plans. Effective management and utilization of the company's knowledge and skills are critical to sustaining long-term performance.

### ***Theme 2: Effective Mentoring and Coaching Strategies***

The findings confirmed that mentoring and coaching among employees fostered an environment for the sharing of tacit knowledge. For knowledge transfer to occur, employees must engage in mentoring and coaching activities to transfer their knowledge to others while acquiring knowledge from them to customize and repurpose it (Chen & Hung, 2010). Tacit knowledge transfer is the process of transferring knowledge, experience, and ideas from one individual to another through informal and formal mentoring and coaching relationships (Gegenfurtner et al., 2020; Kim et al., 2019).

### ***Theme 3: Strategies for Technology Adoption***

The findings confirmed that technological advancements and adoption are progressing at an unprecedented rate. Despite the rapid pace of technological change, individuals want to learn at their own pace, following their interests and needs. KM centers around people, process, and technology (Wiyono et al., 2025). Process refers to the storage, sharing, and use of knowledge (Wiyono et al., 2025). Technology incorporates the use of technological devices to facilitate KM (Wiyono et al., 2025). The importance of collaborative tools became evident during the COVID-19 pandemic. There are several collaborative tools available in the marketplace for document sharing, collaboration, and KM. Centralized tools such as Google Docs, Microsoft SharePoint, and Confluence offer the possibility of structured and organized data (Bilek, 2025). Institutions are investing in cloud services such as SharePoint. SharePoint provides a robust base technology for a KM system and helps organizations share and manage

content, knowledge, and applications to empower teamwork, quickly find information, and seamlessly collaborate across the institution.

### **Relevance to Conceptual Framework**

The relevance of findings to the tenets of OKC theory was the importance of tacit and explicit knowledge for organizational KM, capture, and transfer. The data analysis revealed that (a) fostering a knowledge-sharing culture, (b) mentoring and coaching, and (c) technology adoption are strategic tools of KM, capture, and transfer. The participant responses supported the tenets of Nonaka's (1994) OKC theory.

The four stages of OKC, SECI, were used as a systematic approach to guide the study's data collection and analysis (Almuayqil et al., 2017). Nonaka's (1994) SECI spiral model (Figure 1) was the most appropriate framework for this study, as it addresses knowledge transfer through organizational processes and focuses on the conversion of explicit and tacit knowledge. The spiral begins with the socialization stage, in which tacit knowledge is transferred through direct interaction between individuals, facilitated by direct experience, such as observation and hands-on practice. In the next stage, externalization, the implicit knowledge is converted into explicit knowledge through dialogue, reflection, conceptualization, and documentation. The following stage combination involves integrating explicit knowledge to create new knowledge, for example, by consolidating information from reports and databases. The SECI spiral ends with the internalization stage. This stage involves transforming explicit knowledge back into tacit knowledge through learning by doing, such as reading documents and/or

manuals about the institution and performing the actions described. (Farnese et al., 2019; Zhang et al., 2025).

The value of tacit and explicit knowledge in the process of knowledge creation is evident. The SECI model illustrates the process of knowledge creation through knowledge conversion from one stage to another, resulting in a new quality of knowledge (Farnese et al., 2019). Nonaka's (1994) SECI model was the most appropriate framework for this study, as it addressed knowledge transfer through organizational processes and focused on converting explicit and tacit knowledge. Knowledge sharing can be achieved through several techniques, including fostering a knowledge culture, professional training, mentoring, coaching, huddles and meetings, supervision, personal conversations, intranet, and other cloud-based technologies such as SharePoint. Knowledge transfer and creation contribute to the organization's knowledge-sharing process and its capability to sustain a competitive advantage (Farnese et al., 2019).

### **Business Contributions and Recommendations for Professional Practice**

The surge in employee attrition following the COVID-19 pandemic, the Great Resignation, and the mass retirement of baby boomers has led to widespread employee exits across many industries, intensifying knowledge loss and disrupting organizational continuity (Serenko, 2023). The pandemic accelerated the Great Resignation by enabling remote work, which encouraged employees to seek employment outside their immediate geographic area, thereby providing them with more career options. Additionally, policy changes implemented in January 2024 intensified labor concerns in Canadian higher

education, triggering financial instability at several Ontario colleges and leading to layoffs and heightened uncertainty for faculty and staff (Haidar, 2024).

This study's findings may make significant contributions to the professional practice of business, particularly in capturing and transferring the knowledge of experienced employees to sustain performance. Several strategies emerged from this study that business leaders can adopt to ensure the sustainability of their organizations. Theme 1 focused on strategies for fostering a knowledge-sharing culture. Managers have a significant role in promoting a culture of knowledge sharing. Cultural values impact the way individuals share both tacit and explicit knowledge (Castaneda & Ramírez, 2021). Effective managers encourage employee buy-in, identify key knowledge holders, and employ a combination of methods, including job shadowing, mentoring, and coaching, to capture and transfer both explicit and tacit knowledge.

Theme 2 focused on mentoring and coaching strategies. Mentoring is a comprehensive business strategy that leverages the knowledge of more experienced employees to support new employees or those with less experience. Effective managers initiate mentoring programs to transfer knowledge, including job shadowing sessions to capture seasoned knowledge (Cox & Overbey, 2023). Through consistent regular meetings, clearly defined objectives, and metrics, tacit knowledge transfer can be achieved.

Theme 3 focused on strategies for technology adoption. Institutions are investing in cloud services such as SharePoint. SharePoint transfers knowledge by serving as a central hub for storing, organizing, and sharing information through features such as

document libraries, sites, and intranets. The broad dissemination and application of these strategies can increase knowledge capture and transfer, improve workforce readiness, and enhance long-term, sustainable performance.

### **Implications for Social Change**

This study could be significant in that I aimed to identify and explore strategies that captured and transferred the valuable knowledge of experienced employees to less experienced employees. When employees resign or retire from their jobs, employers lose the institutional knowledge or history that employees take with them, and many organizations miss the opportunity to capture and transfer the knowledge of the departing employees to those who remain in the organization. Successful strategies for capturing and transferring knowledge can contribute to employee motivation, knowledge, and skill development, ultimately leading to greater job satisfaction and enhanced job performance. Knowledge sharing supports both organizational growth and employee development. The implications for positive social change include the potential for human resources managers and academic administrators at colleges and universities to drive competitive advantage and business growth, as well as enhance employee development.

Declining enrollment in the education sector triggered financial instability across several Ontario colleges, resulting in substantial layoffs and heightened uncertainty for the college sector. Supporting talent development, upskilling, and reskilling are more essential than ever to ensure Ontario's college workforce remains resilient in the face of disruption. This research is significant as it will help managers implement effective strategies to capture and transfer knowledge between employees, thereby strengthening

overall institutional knowledge. The findings from this study may foster positive social change, as employees with increased knowledge may have greater opportunities for career advancement, thereby contributing to a sustainable workforce.

### **Recommendations for Further Research**

This study contributes to the literature on identifying and exploring successful strategies employed by some Canadian higher education managers to capture and transfer the knowledge of experienced employees, thereby sustaining performance. Despite the strengths of this study, some limitations surfaced. A limitation of this study is that the research participants might not be entirely interested or forthcoming during the interview process. Future researchers conducting similar studies could consider contacting their research participants prior to the interviews to build rapport and establish trust. Additionally, research participants may not possess the necessary level of experience to answer the research questions outlined in the study. Expanding the research participant eligibility criteria beyond 3 years of managerial experience may identify new themes and approaches to capturing and transferring knowledge between employees. Another limitation is that participants may not have fully shared proprietary institutional information. A case study approach could be utilized to allow participants to share proprietary information.

### **Conclusion**

The purpose of this qualitative, pragmatic inquiry study was to identify and explore successful strategies employed by some Canadian higher education managers to capture and transfer the knowledge of experienced employees, thereby sustaining

performance. Academic institutions have experienced significant staffing challenges due to unexpected employee departures and long-anticipated retirements. As seasoned professionals leave the workforce, organizations risk losing critical experiential knowledge. Through thematic analysis of the data I collected, I identified strategies that managers in higher education can use to enhance tacit and explicit knowledge transfer. The three themes that emerged were (a) strategies for fostering a knowledge-sharing culture, (b) mentoring and coaching strategies, and (c) strategies for technology adoption. The findings from my study will contribute to positive social change and improved business practices by providing academic managers in higher education with knowledge-transfer tools that drive competitive advantage and enhance employee development.

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