



# Master's Thesis

## Knowledge transfer in the Global Financial Services unit of a case company

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## **Abstract:**

The knowledge is one of the main organizational assets. Existing knowledge transfer strategies ensure that knowledge remains accessible to everyone, supporting a continuous knowledge transfer even when a personnel change occurs. The primary aim of the research was to analyze the current state of knowledge transfer in a case company, addressing questions about the factors that support or hinder knowledge transfer. The research was conducted as a qualitative case study with 14 semi-structured interviews investigating the topics covering documentation, onboarding practicalities, and methods of knowledge transfer. The results revealed four dimensions defining the knowledge transfer in the case company: 1) the current work practices, 2) motivation drivers explaining motivators and learning culture, 3) barriers confirming resistance elements and obstacles, and 4) suggestions for improvement including standardization, knowledge transfer strategies, and competence evaluation. The results indicated that successful knowledge transfer includes harmonized onboarding practicalities, clear communication, organizational support, recognition of achievements, and a curious attitude among individuals. The recommendation for future research is to broaden the topic to include knowledge management elements and conduct a closer investigation of knowledge transfer theories.

## **Keywords:**

Knowledge transfer, knowledge sharing, knowledge transfer barriers, motivation to knowledge transfer

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# 1 Introduction

There are constant changes in the work environment. Organizations are often forced to face situations where employees leave and take a significant amount of valuable knowledge about the organization and work, without sharing all knowledge with their successors.

The topic of this study is important because inefficient knowledge transfer (KT) and sharing cause losses in work productivity. Knowledge is often in people's minds, and it boosts the success of organizations. There is a need to understand how knowledge sharing (KS) works and which elements support the most efficient KT processes. Possible obstacles to KT can be avoided if they are recognized. The thesis aims to secure the successful KT in the organization, enabling teams to operate uninterrupted.

The main asset in many organizations is knowledge. Values, rules, and experiences from different origins form a frame for knowledge. The definition of knowledge by The European Commission (2015) is a fusion of information and data, where experiences and opinions are used as an asset, which can improve the decision-making capabilities in organizations. (Mazorodze & Buckley, 2020)

The result of organizational success lies heavily on knowledge management, especially on the ability of KT. Mohajan (2019) states that KT is a necessity in an organization. KT being complex has been discussed in many papers and there is an urgent need to understand how to conduct knowledge transfer. Every organization has a different capability of transferring knowledge between individuals or teams (Goh, 2002).

Large organizations have support functions, which provide services and expertise in the areas such as finance, human resources, communications, and IT. The support functions are acting efficiently in a supportive role of a core business. Rehse et al. (2020) state that efficiency brings added value to a support function. Financial shared services units often have professionals, who easily tend to change to different teams, either internally or outside of the organization. These employees usually have a lot of knowledge, which needs

to be preserved and transferred properly to ensure the continuity of the work and business support.

Organizations must provide access to the knowledge needed for employees, enabling them to perform the needed tasks. Once learned, employees can't have all that knowledge by themselves. It must be available for anyone who is authorized to use it for the common benefit of the organizations. According to Foss et al. (2009), job design characteristics can motivate employees to share their knowledge, meaning for example task identity (ability to perform a task from beginning to end) and feedback from managers.

KT is based on the exchange of organizational knowledge between one who provides information and the other, who receives it. According to Goh (2002), it is extremely important to include the KT process as a continuous management activity for organizations. Effective KT works in organizations as a high level of trust, enhancing information sharing. Openly made decisions, the large availability of information, and the working environment are the keys to high trust. Organizations need to identify how their own KT processes work and what kind of fundamental elements would support KT best, ensuring the best possible outcome of streamlined and effective unit functionality.

## **1.1 The case company**

The case company is a multinational company producing sustainable and renewable raw material solutions. The company's solutions are helping customers to reach their sustainability goals. The Global Financial Services (GFS) unit is part of the Finance function. It has 106 employees working in different teams. Commonly, there is a constant change within personnel in that size of a support function, as there are also lots of possibilities within a large organization and it is natural for employees to move to new roles. Therefore, a case company recognized that one of the most important assets, the knowledge of employees, needs to be transferred systematically and ensure that despite the change in the background, none of the personnel changes in daily operations would harm the continuity of work.

During all changes, it is critical to understand how KT is handled in the GFS. The current ways of working and related supporting documentation should be clearly defined and

transparent for easy replication. Identifying motivation factors and the barriers to knowledge transfer and determining the transfer mechanisms are essential in the process. To ensure quality and continuity in daily operations, specific KT processes should be taken into account. For these purposes, cross-functional learning between teams can be beneficial, especially in identifying the required training to bridge knowledge gaps.

The knowledge and expertise are often on different levels between employees in such a wide, global, and diverse organization. Also, the capability of sharing knowledge varies a lot. The employees are in the critical role of sharing their knowledge to deepen everyone's expertise and transfer information further. Currently, there are different approaches and practicalities in how KT is done. Thus, there is a need to collect these in one place, helping with decision-making.

## **1.2 The aim of the research**

This study analyzes the current state of how KT is handled in the GFS unit, recognizes active and pain points in the process, and provides practical suggestions for improving KT. The study also focuses on KT practices, leading to continuous functionality, especially in personnel change situations. This will help team leads plan future actions based on the current needs. The study responds on a general call to a better understanding of the KT in organization.

This study raises the following research questions:

- 1: How does knowledge transfer work today in the case company?
- 2: What are the main drivers and barriers for effective knowledge transfer in the case company?
- 3: What are the suggestions for improvement?

### **1.3 Structure of the research**

The first chapter introduces the background and the aim of the research. It presents the case company and defines the research questions. The second chapter continues by presenting previous studies and reviewing the theoretical background for this research. The following chapter explains the methodology used and how the data will be collected and analyzed. Chapter four presents the results, which are divided by identified themes. The results are analyzed and discussed in the following chapter. Chapter Five also summarizes recognized topics and provides suggestions for improvements and future research.

## **2 Literature review**

This chapter reviews prior literature on KT in organizations. According to Rotsios et al. (2021), KT has been extensively researched, starting already in the 1970s and defined by various studies. This section consists of exploring the theories about KT and KS definitions, the successful factors of KT as well as the factors hindering KT in the organizations.

Thomas (2019) states that knowledge acts as a resource and in the best scenarios, it can boost the performance of the organization. According to Szulanski et al. (2004), in theory, it is clear that KT can have a positive impact on organizational productivity and growth. In practice, many studies show that KT is poorly handled and valuable ideas and practices are failed to transfer by organizations.

Thomas (2019) describes the organization's managers as powerful mechanisms in the ability of KT. He suggests that both tacit and explicit knowledge can be transferred by using an alternative mode, such as narratives. Storytelling enables the development of general beliefs and behavior. In a skills-based KT, storytelling can't be the best tool. However, it shows strong benefits in the areas of conflict resolution, innovations, organizational change, and problem-solving. Storytelling helps managers to develop more sustainable social relationships with employees. Through narratives, the values and norms are easier to perceive in comparison to rules and policies.

## **2.1 Knowledge Definition and Knowledge Transfer**

Knowledge is described to be in two types. Explicit knowledge is objective and can be easily codified, captured, transmitted, and presented as manuals. It doesn't attract competitors as much as another type, tacit knowledge, which is subjective and difficult to formalize. Tacit knowledge is personal, collected over time, and it acts as a source of competitive advantage, being also complicated to transfer. (Gooderham, 2007; Goh, 2002) Tacit knowledge is described as a certain know-how, hands-on skill, it's not well documented but works seamlessly in the mind of a possessor (Mohajan, 2019).

The key method of sharing tacit knowledge is for the recipient to work closely with the person who is in the role of the source. Passing the tacit knowledge further involves externalization, where the source encourages the recipient to participate in conversation and discuss thoroughly to achieve understanding. (Bartol & Srivastava, 2002)

Rotsios et al. (2021) state that KT is about flows from sources to recipients, with the aim of competitive advantage and organizational development being crucial for the success of organizations. According to Hanif et al. (2020), knowledge sharing is one competitive advantage for organizations and employees must be encouraged towards that goal. Vaghefi et al. (2018) confirm that knowledge sharing between teams, individuals, and departments is the form of KT.

Cooperation and collaboration are essential parts of KT. There shall be a willingness of an individual to share the knowledge. This benefits both parties. The level of trust defines how the collaboration will work. Levallet and Chan (2018) describe that monitoring, implementation, and prioritization are continuous tools in planning successful KT.

### **2.1.1 Knowledge sharing**

KS is part of the KT. Khoza (2019) states that knowledge sharing leads to a competitive advantage. KS enables organizations to meet the demands of the market. Management's support and certain support mechanisms for employees can motivate them to share knowledge continuously. The literature outlines that employees are not willing to share knowledge, as they are afraid that might lead to losing their positions. Psychological

factors, heavy workload, lack of motivation, change resistance, and communication issues are also the factors that are limiting employees from sharing their knowledge.

Both KT and KS definitions often overlap and appear in the same or similar references and are both based on the sharing of information. KT includes various interactions between, across, and among groups and individuals. It works both ways, to and from. (Paulin & Suneson, 2012)

Accessible and existing knowledge is identified as key elements in successful KS. To succeed, managers shall provide sufficient training, provide feedback, and access to collaboration across business units. Attitudes, values, beliefs, experiences, and mindset towards KS are dependencies to the creation of learning culture. (Mohajan, 2019)

Knowledge management is a vital tool for gaining a competitive edge. Success in knowledge management relies on effectively implementing various strategies and tools within specific organizational contexts. To enhance organizational capabilities in this regard, it's crucial to start by thoroughly understanding and evaluating a firm's knowledge management practices. KT is considered the most important element in knowledge management implementation. (Guribie & Tengan, 2019; Vaghefi et al. 2018)

Wambui and Muthura (2013) explain that KT points to decrease the gap between knowledge and practice. Passing experiences, lessons learned, and way of working practices are additional elements improving the gap. KT helps to recognize tacit knowledge systematically fill the gaps and turn it into an explicit one when knowledge management is involved.

Based on their research, Mazorodze and Buckley (2020) listed effective tools for KT in knowledge-intensive organizations. Community of practice, mentoring, and storytelling stood out from others. They foster knowledge sharing among their members through internal discussion and teamwork. It also emphasized the significance of KT activities and their ability to be implemented into organizational structures and processes, a fundamental piece of a successful organization. According to Navidi et al. (2017), best practices research, documentation, structured job training, and critical incident review are

identified tools for KT. Xu and Ma (2008) list forms, dialogue-focused meetings, and document exchange as vital elements in effective KT.

Gooderham (2007) refers to the concept of KT as how it will be accumulated as new knowledge on the receiving end. He concludes the description with a reference from Minbaeva et al. (2003, p. 587): “The key element in KT is not the underlying (original) knowledge, but rather the extent to which the receiver acquires potentially useful knowledge and utilizes this knowledge in its operations.”

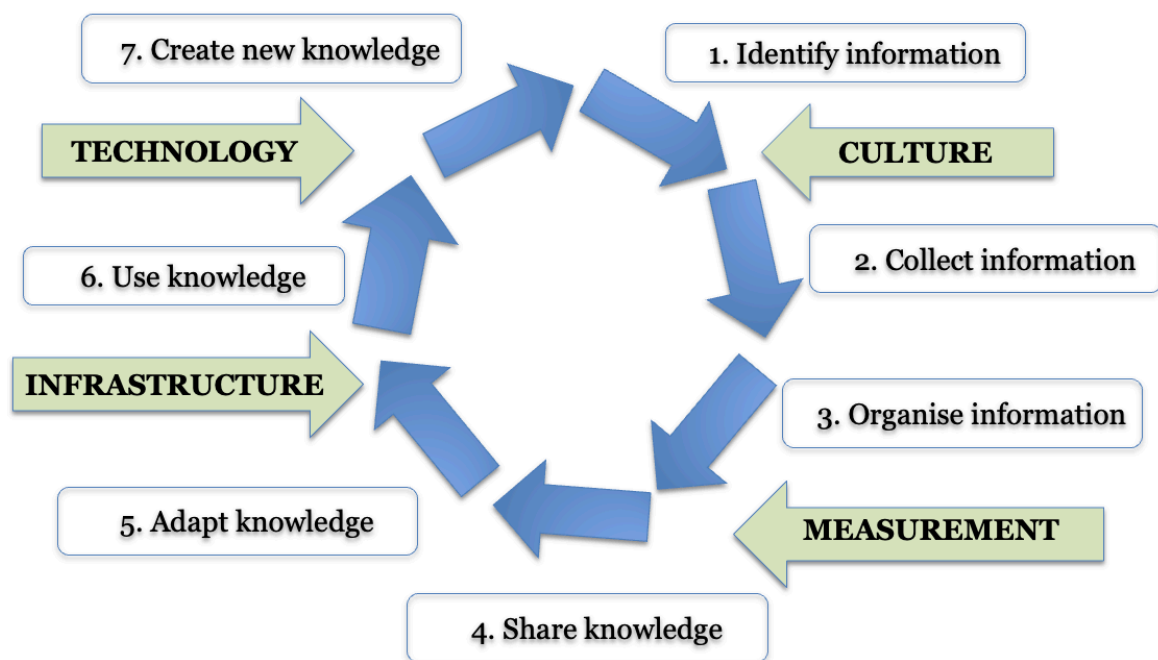


Figure 1. Steps in the KT process in a KT-enabling environment. Adapted from Guribie & Tengan (2019)

Figure 1 outlines the stages within a KT process in an environment designed to facilitate KT. The framework introduces seven distinct knowledge management processes, which rely on four key environmental factors for their effective operation: a supportive knowledge management culture, appropriate technology, infrastructure, and regular performance measurement. However, despite its strengths, this framework does not distinguish between the types of knowledge, such as tacit and explicit. It mainly emphasizes the KT processes and the supportive environmental factors, leaning towards a process-oriented approach and providing less focus on the various techniques and tools involved in knowledge conversion. (Guribie & Tengan, 2019)

Transferring knowledge into actions can be demanding due to different behaviors in the background, lack of sufficient amounts of proven theories in this matter, KT interventions in process descriptions, and lack of tools, that can help to evaluate activities. There is no single way that can work in all circumstances and this makes it complicated for managers to pick a model to use for KT strategies. (Ward et al., 2009)

## **2.2 Drivers Affecting Knowledge Transfer**

There are clear benefits to the centralization of services, but knowledge is the core that is keeping the business going. During the previous years, the pandemic has also changed the way experts work. The successful face-to-face contacts at work switched to a new remote and hybrid-working era. In KT, planning is an essential part of successful transit. The information gathering must happen systematically and as thoroughly as possible to ensure that all scenarios are considered. When communicating all details in different phases of KT, face-to-face contact is still an important role. (EY, 2021)

KT is the process of ensuring that when one employee leaves, the organization retains critical information. To achieve this, the departing employee should have well-documented knowledge and skills. It's extremely important to preserve recourses and knowledge through systematic documentation and sharing of knowledge. Furthermore, an effective KT plan involves identifying key knowledge holders, creating a structured process, utilizing technology for documentation, and enabling a culture of continuous learning. This approach ensures seamless transitions, minimizes loss of critical information, and drives organizational knowledge management.

A good example described by Goh (2002) is that information about mistakes that were hidden. The mistakes can be documented, but if not shared and discussed, then learning, and thus avoiding them in the future is made impossible. Often mentioned issues are limitations in organizational culture and silos, people's attitude (rather than lacking technical possibilities), the culture of competitiveness between subunits and work teams, lack of motivation and eagerness to share information. Goh (2002) mentions also British Petroleum, which managed to succeed in KT. The key factors were senior managers, together

with internal communication channels and other technology-enhancing information sharing.

### 2.2.1 Learning Culture

The ability and motivation of employees can not alone lead to a successful KT. The role of managers is crucial in this process, organizing training for skills development and raising motivation with performance-based acknowledgment and clear communication. (Minbaeva et al., 2003)

Informal interactions are defined as one of the mechanisms that enhance KT. Rewards are closely included in this as perceived fairness helps to build trust between the organization and the individual. (Bartol & Srivastava, 2002)

Kasova and Melichar (2021) describe that communication is an essential method for KT. There are different ways to communicate, and every way creates value for KT and enhances learning. The best way for KT to occur verbally is in the form of mentor- and mentee-led brainstorming sessions, one- and face-to-face meetings.

Figure 2 shows the framework, which is based on the soft factors of KT. Information technology and organizational processes alone won't work in a successful KT.

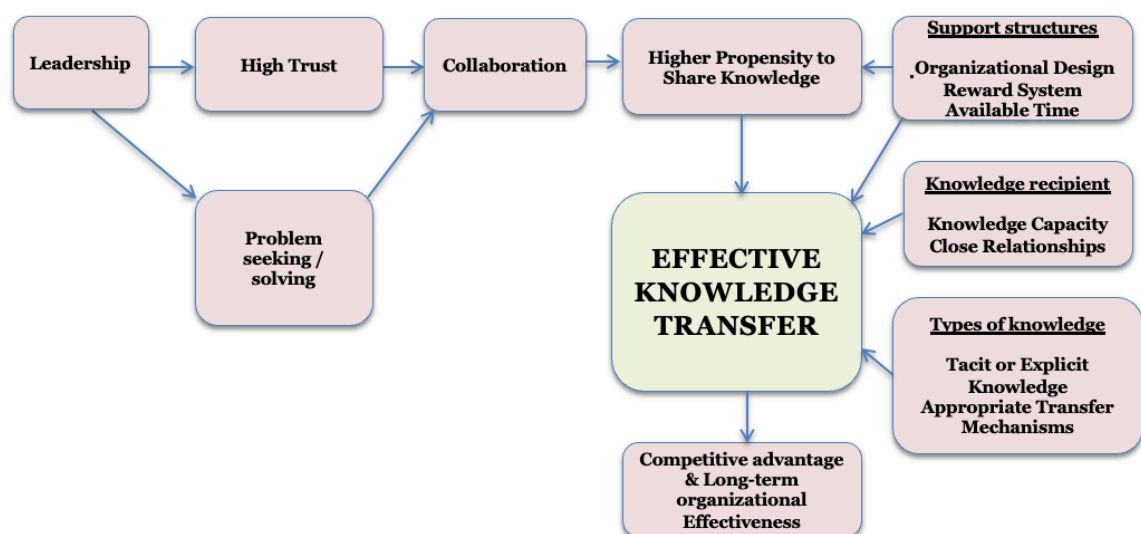


Figure 2. An integrative framework: factors influencing effective KT. Adapted from Goh (2002, p. 28)

Key factors in effective KT are leadership, problem-solving / seeking behaviors, support structures, absorptive and retentive capacity, and types of knowledge. Leaders can lead by example and share and seek knowledge freely in organizations. That kind of behavior creates an environment of trust and enhances information sharing. The attitude of sharing and seeking information shall be embedded in organizational culture. When employees are motivated and encouraged, it is easier to adopt an attitude of continuous learning and have it as a supporting value.

There is a lot of knowledge throughout project implementations. Addressing effective KT between different projects enhances the ability to acquire new methods, techniques, and valuable insights from others resulting in improved efficiency. The lack of KT among projects shows in repeating mistakes from the previous cases. On the other hand, social interactions and practices accelerate KT between project teams. (Ren & al., 2019)

KT is a two-dimensional process where employees share their tacit and explicit knowledge. As a result of knowledge donation and collection mix in the process, new knowledge can be created. The use of both processes leads to a trust and respect increase. Donation refers to a willingness where employees to share their experiences of best practices by talking, listening, and learning by observing. This is helping to develop a way to solve the possible issues quickly. The collection of knowledge is more of consulting colleagues and learning through different sources. (Mohajan, 2019)

Professional knowledge, coordinating knowledge, object-based knowledge and know-who are four forms of knowledge. Communities of practices (CoPs) is where professional knowledge is created. It's a combination of an individual's formal educational background together with an experience of work performance. Coordination knowledge is embedded in organizational rules and standards and experience of how tasks are supposed to be performed. Employees acknowledge how knowledge is used in their organization. Object-based knowledge refers to coordinating knowledge to be applied to a certain object or task. And know-who knowledge stands for a knowledge of who does and knows what. It helps with navigating to the right persons in need of help in problem-solving. (Mohajan, 2019)

Vaghefi et al. (2018) present the process model of KT (see Figure 3) built on top of the originally formulated Szulanski's multilevel model. The model includes four different stages, each presenting enablers and barriers in KT. The initiation stage describes how a decision of KT is born and progresses including identifying solutions and depending on the motivation and willingness of the knowledge source. The supportive elements are culture, motivation status, and the relationship between sender and receiver. When the decision of KT is completed, the implementation stage begins. The ramp-up stage describes utilizing knowledge at the receiver's end. The key element is the nature of knowledge and the ability or receiver to utilize its learnings. Individual characteristics can either support or hinder understanding of received knowledge, depending on the individual's abilities. The final, integration stage describes knowledge already functioning as part of a routine. This phase's outcome also depends on how knowledge is utilized and embedded in existing practices.

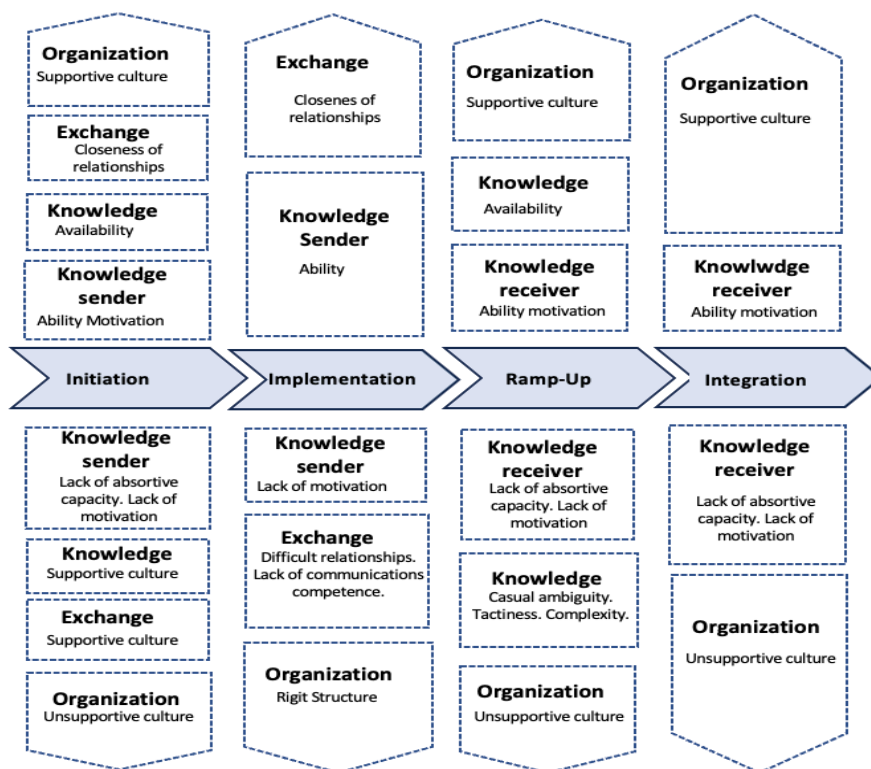


Figure 3. The process model of KT. Adapted from Vaghefi et al. (2018, p. 11)

## **2.3 Barriers Affecting Knowledge Transfer**

Mohajan (2019) lists the lack of sharing resources in organizations and managerial direction, proper leadership, unwillingness to share knowledge of experienced team members, and missing mechanisms for sharing tasks as the factors for the barriers in KT.

Guribie and Tengan (2019) describe that the process of knowledge management faces a range of challenges, making its implementation complex to implement. These challenges are primarily centered around human factors. Other identified obstacles are poor organizational culture, ineffective communication structures, and time limitations.

The four elements for barriers in KT are lack of communication between different groups, time limitations, which resulted in poor execution of tasks, lack of understanding of common goals and project tiredness occurred by heavy workload. (Sunnemark et al., 2023)

Vaghefi et al. (2018) have divided barriers into different categories to have a better understanding of different levels and help with decision-making on how to tackle them. Casual ambiguity, tacitness, and complexity are categorized under knowledge. Difficult relationships, lack of trust, lack of credibility, and lack of communication competence are related to the exchange. Lack of motivation and lack of absorptive capacity are related to the knowledge sender and receiver. Unsupportive culture and rigid structure are categorized under organization.

According to Javernick-Will (2012), barriers for KT are lack of time and monetary resources, poor processes, organizational and individual factors, and reluctance to share information as it might affect the feeling knowledge is power, which some are willing to decrease for the benefit of others. Other mentioned barriers hindering KT are hierarchical organization structure and geographical locations of teams. Al-Alawi et. al. (2007) highlight that KT obstacles in organizational culture are unique. Hence the solutions for identified challenges need to be approached from their organizational perspective.

### **3 Methodology**

The research is conducted as a qualitative case study. It investigates what has been noticed during continuous changes, what has been recognized, and what still needs to be known and learned ensuring that KT occurs in all actions decreasing crises.

The research focuses on a case company's GFS unit, which consists of 106 employees. This study involves 14 interviews as part of the qualitative study. The interviews were with experts and leaders in finance and accounting all working or having expertise in GFS. It is vital to understand the importance of KT in the onboarding process and its supportive elements, enabling a continuous way of performing in a shared services unit.

A detailed explanation of the methodology can be found further. In this chapter, the emphasis is on defining the research's selected design and methodology. The research methods, which involve qualitative techniques such as semi-structured expert interviews and data analysis methods, especially thematic analysis, are explained and evaluated. This evaluation discusses trustworthiness and ethical considerations. It also includes the potential of generalizing the research findings.

#### **3.1. Research method**

Eriksson and Kovalainen (2016) mention that no matter the material (textual, verbal, or visual), the common feature of qualitative data is that it is rather open for interpretation. Greener (2008) explains that there might be several approaches to qualitative analysis, e.g. data display and analysis, grounded theory, narrative analysis, and many more. These approaches can overlap, but the aim is more of theory building rather than testing. Qualitative research must be very transparent for the readers to understand how the researcher ended up with the research conclusions, as the outcome might be different from other researchers using the same analysis.

Yin (2018) suggests that case studies are most useful when a researcher wants a deep understanding of a real-world situation. It's a hands-on approach that deep-dives into a current phenomenon. The key parts of case study research include questions, propositions, the actual case, the reasoning connecting data to propositions, and the standards for understanding the results.

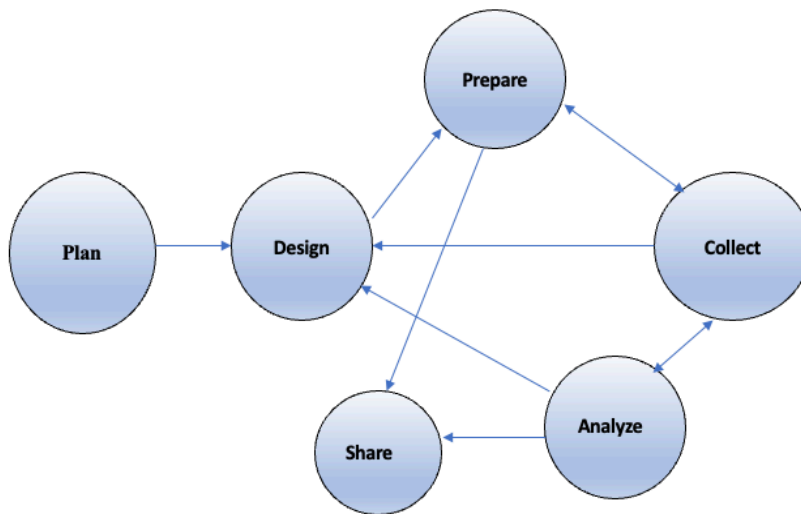


Figure 4. Doing Case Study Research: A linear but Iterative process. Adapted from Yin (2018)

Figure 4 shows the flow in the structure of a case study. You begin by planning and figuring out why it's the best method. Then, in the design phase, you define the case and create a research question. Next comes preparing, where you carry out the steps for your planned case study. Collect involves gathering data from selected sources. During the analyze phase, you look for patterns and insights in the data. Finally, in the sharing phase, you conclude and present the results and findings of the case study. (Yin, 2018)

The case study was chosen, because it offers practical benefits and provides valuable insights to both the researcher and a participant organization. As a researcher, I wanted to deep-dive the factors, which can lead to better practices and efficiency based on real-life environment examples, as well as develop problem-solving skills and gain a deeper understanding of the KT methods. Semi-structured interviews offered a unique environment for participants to freely express their valuable opinions and insights anonymously and uninterruptedly, without the usual workload on top of the discussion.

This approach not only provided a deeper understanding of the current state but also allowed interviewees to articulate their thoughts in a structured and organized way. However, being able to discuss freely without limitations on the matter helped with the data collection. I took the role of a researcher rather than a colleague, staying out from offering

comments on statements of interviewees. My main responsibility was to guide the interviews by continuously pointing questions centered around the why, how, and what your opinion on the theme is. The approach of qualitative research gives more possibility of focusing on the process and cooperating a lot with stakeholders involved as well as generating the theory in the process. Qualitative research measures words rather than data. The chosen method is based on the needs of a client organization. (Bryman & Bell, 2015)

## **3.2. Sample and data gathering**

Semi-structured interviews were carried out with 14 experts, with many of them working as team leads, but were not limited to one role. The sampling was chosen to be deliberative, involving experts from each team in the unit to capture diverse perspectives on how things are managed in different teams within the same unit. The experts have been in their roles for varying lengths of time, ranging from one month to several years, providing a valuable range of insights and experiences. The structure of the interviews was formulated together with the case company.

Interviews are conversations between people. So, it's important to consider how the social setting, including where the interview happens and the attitudes involved, can influence the interview. (Bergin, 2018)

There were a total of 14 interviewees occupying various positions, including Team Leads, Service Manager, AP Manager, Process Owners, and Specialists. To ensure greater anonymity, I have grouped Team Leads and Managers under the collective term "Managers" for the purposes of this research. Similarly, Process Owners, Key Users, and Specialists have been categorized as "Senior Experts" due to their gathered expertise. Hence, I referred to the interviewees using their respective code names, as provided in Table 1.

### **3.1.1 Data gathering process**

In early October 2023, I sent out the invitations for the interviews, and the first round of interviews began the following week. This gave the participants some time to familiarize themselves with the subject matter. During the following one and a half weeks, I conducted a total of 13 interviews, followed by a one-week break and then continuing with

the final 14<sup>th</sup> interview. As I progressed through the interviews, it became easier to guide the discussions in the desired direction.

All interviews were conducted via Google Meet and they were recorded on video. The interviews ranged from 29 to 52 minutes, depending on follow-up questions and the interviewees' level of engagement. All experts had one-hour slots reserved in their calendars for the interview and the interview sessions also included discussions beyond recording. I as the interviewer clarified that I would facilitate the discussion but would not interject with my thoughts on the topic. Guided and semi-structured interviews are where a researcher has a list of the topics to which he or she would like to get responses, but the interview might also not include topics, depending on what the interviewee has commented. Eriksson and Kovalainen (2016) suggest that many simple questions are better than one complex question. Neutral questions help to avoid pre-assumptions with responses. All interviews need to be audio recorded and transcribed. (Bryman & Bell, 2015)

Interview questions are open-ended enabling participants for a narrative description concerning the topic. The interviewer's role is to listen carefully and help to develop a discussion. Galletta (2013) presents participants' rights and comfort as the opening segment in a semi-structured interview. She lists broad topics enabling to the discussion about participants' experiences, however relating to the research topic.

Before each interview began, the interviewer repeated the important information provided to the interviewees in advance in the form of a consent form and of how the interview will be conducted. This included the purpose of the interview explained in a detailed level, its nature, notification that it would be recorded and transcribed, and a guarantee of confidentiality and anonymity for the interviewee. The consent form is added as an appendix 1.

Before the interview, the list of questions that were to be asked was shared in advance (appendix 2). However, before the interview itself, each participant was informed in a discussion regarding the specific themes to which the questions were categorized. These themes involved an examination of the interviewee's background, an evaluation of the status of KT, and an exploration of both the barriers and the drivers involved in the process.

Most of the interviews were conducted in English, as it is the primary language used in the organization. Finnish was also an option, and some interviewees chose it instead of English. This approach encouraged more candid feedback as interviewees felt more comfortable expressing themselves in their native language.

Data collection means not only the empirical data but also the data gathering design. Typically, it consists of answering the questions of what and how: what kind of data is needed, how to collect the data, plan, and document it. A researcher needs to get consent for data gathering and explain the need and use of data clearly to everyone involved in the research. (Eriksson & Kovalainen, 2016)

### **3.1.2 Analysis of data**

An analyzing tool in this research was the Gioia method, which is capturing the concepts of human organizational experience and scientific theorizing about the same experience. It produces a trustworthy analysis of qualitative data and confirms if the research conclusions are defensible. There are links between data and insights of the qualitative research with a systematic presentation of 1st-order and 2nd-order analysis. Meaning that the first order was using informant-centric terms and codes and the second order researcher-centric dimensions. (Gioia et al, 2012)

### **3.3 Choice of interviewees**

In this research, the criteria for selecting interviewees were established before reaching out to experts in various roles such as team leads, process owners, key users, and specialists. These individuals are in a vital role in helping to understand the current state of KT in the GFS of the case company. Interviewees were identified based on the discussions with the head of GFS. After identifying the candidates, I contacted them personally and requested them to participate in the research. This approach was chosen because of the need to find experts with an understanding of the complexities of current KT processes.

Table 1. Overview of respondents.

Number	Interviewee's role	Code
1	Senior expert	Person A
2	Manager	Person B
3	Manager	Person C
4	Manager	Person D
5	Manager	Person E
6	Manager	Person F
7	Senior expert	Person G
8	Manager	Person H
9	Manager	Person J
10	Senior expert	Person K
11	Manager	Person L
12	Manager	Person M
13	Manager	Person N
14	Manager	Person P

This research focuses on the KT based on the experiences and insights shared by the experts. KT experiences are particularly crucial during the onboarding phase, regardless of the employee's role. The capabilities of the teams and the efficiency and effectiveness of the onboarding process impact the learning involved in KT.

The research also investigates the barriers and facilitators of the KT process. Interviewees with diverse roles and experiences in critical situations are likely to provide valuable insights for evaluating significant suggestions, making them desirable interviewees.

### 3.4. Data analysis

Data was analyzed with the Gioia method and presented with clear evidence and a story behind the formulation of new concept development and theoretical discovery. The conclusions of these are "sense giving". The focus is on the new findings or new twists of existing concepts. Gioia et al. (2012) emphasize how the discussion section of grounded theory presents the transformation of a data structure into an inductive model.

Analyzing qualitative data can be a big task because it's often extensive. The researcher needs to think deeply, digging into the details to make complex insights clear and understandable for readers. This involves describing the main findings in a clear and organized way. Coding involves organizing data into categories to discover important themes. This

helps simplify the analysis by concentrating on relevant issues. Once the coding phases are finished, the next step is for the researcher to begin documenting the results. The most challenging part of writing involves deciding which findings to include. The aim is to honestly represent the data and accurately portray the insights of research participants. (Bergin, 2018)

After completing all the interviews, I started the data analysis phase. This involved the transcription of the interviews and ensuring the clarity of the recorded conversations. When reviewing these transcripts, I found myself transported back to the moments of the interviews, which helped me in the pre-structuring of each interview before the actual analysis phase began.

The aim of researchers is to get as much information as possible, using informants' terms. There is a risk of the researcher being too close to the informant and not being able to have a higher-level perspective. Thus, in the collaborative team must be one member with an outsider perspective. The interviews for this research were executed with familiar but not known persons, enabling trusting and yet informative replies. (Gioia et al., 2012)

Gioia et al. (2012) describe that at the beginning of analyzing data, the researcher can be lost. As the research progresses, it is easy to see similarities and differentials among categories, which will then be reduced to a manageable number. These categories are then given labels, still containing informants' terms. At this point, the researcher must think simultaneously on behalf of the informant and 2<sup>nd</sup> order of abstract theoretical dimension. The important question is "What's going on here?", which helps to formulate further questions. The 2<sup>nd</sup> order analysis is theoretical. It concentrates on the themes that help to explain the phenomena of observation, focusing on the concepts, which are still new.

After that, Gioia et al. (2012) define that the next step after themes and concepts are structured, is to investigate 2<sup>nd</sup> order themes further into aggregate dimensions. The outcome of 1st-order terms, 2nd-order themes, and aggregate dimensions is a visual presentation of data structure, which presents how the raw data is divided into terms and themes. At the same time as themes and concepts are emerged, literature needs to be investigated to see, if the outcome is already existing or something new. There might be a need to revisit data in the last phases of analyzing if some terms are not clear and codings are

low. A data structure aims to present the experiences of informants in a theoretical output. Aggregate dimensions for this research are current work practices, motivation factors, barriers transfer suggestions for improvement (see figures 5 – 8 under the Results chapter).

### **3.5. Trustworthiness**

Three quality criteria for the research are reliability, replication, and validity. Reliability is mostly concerned in quantitative research when the researcher is considering the reliability of the data. Replication describes if the study is replicable. It considered being a must for research. Validity is the most important criterion, as it confirms if the measure of the concept measures the concept of an issue. (Bryman & Bell, 2015)

I asked about the interviewees' backgrounds to gain a deeper understanding of the diverse state of the data sample collection. The individuals I interviewed had a wide range of experiences: some had spent several years in various roles within different teams, while others were recently hired by the organization, some had just transferred into their current roles, and many had versatile experience within the GFS and had witnessed various approaches of KT over time.

The goal of trustworthiness is to make sure that if another researcher repeats the same study using the methods described by an earlier researcher, they will get the same results and conclusions. Even though it's not common to redo a case study, it's important to express a concern about the dependency of the findings. The key is to document the steps taken in your study. (Yin, 2018)

## **4. Results**

The analysis of the data revealed clear themes when I looked at the main points from the interviews based on the first-order codes. The list was quite large, however, I managed to capture all the crucial insights. These insights together formulate the foundation and lead to four aggregate dimensions. Themes and aggregate dimensions are described and presented below.

## 4.1 Current work practices

The first dimension presents the existing way of work practices within GFS. To get the needed information from the interviewees, I touched the topics such as the types of templates and documentation being utilized. My focus was on understanding how knowledge is transferred within teams and exploring the presence of any existing roadmaps. Furthermore, I aimed to explore different KT methods in GFS and overall communication processes. There are three themes identified for current work practices: (1) training and onboarding practicalities, (2) learning approach, and (3) communication and cooperation.



Figure 5. Current work practices in GFS

#### 4.1.1 Training and onboarding practicalities

The onboarding was identified as one of the main factors in KT. Many interviewees described that the basics are in place. All teams have access to versatile tools, which enable them to create and share the proper instructions. Everything is saved in the digital folders. The connection is easy to maintain via emails, chats, and video meetings. However, results also revealed that work instructions and documenting and collecting information vary between teams, mostly covering basics, often with outdated content. It was noted that support was available from key users and process owners for those in need, but it was seldom realized when people sought support.

Most of the interviewees mentioned the awareness of the fragmented way of instruction forms and onboarding. They explained that the reason behind this is the lack of time and many urgent things happening at the same.

Every team has its way of documenting the instructions and other induction materials. But on a high level, I think that we are in quite good shape. – Person B

We have our specific chats where the knowledge is transferred, and communication is happening. – Person F

Now it is very fragmented where you can find the information as it is stored in some weird logic. – Person B

Instructions have general information about the team, what the whole company does, and how it's connected with other teams. We do have our own Google Drive, where we have all the instructions, but the instructions are messy. They are not named. They are not like uniforms, they're not the same way. If somebody did one instruction, it has pictures but not too many sentences. Or there could be another instruction, that has a lot of examples, and a lot of text, but not so many pictures. There should be some uniform way to do this, so whenever you open an instruction, the first part is about what this instruction is, and for what transactions I need to use. We have instructions where the first picture is already from the transaction. You don't know anything about what transaction it is because it's assumed that you know, but a new person wouldn't know. We have been talking about fixing the instructions for a long time, but because of the way of working, nobody has time. – Person N

I think we could be better at making notes from the meetings, maybe that would help meetings. – Person E

People are quite busy with different tasks, so there is not much room for thinking about the KT. How do we save all this information? For example, what has been decided on different projects why this was done, and why not something else? So much is going on. That the situation is never stabilized. Because all the time, something is occurring. – Person H

There is always an open door for key users and process owners if anyone from the team finds something confusing or they don't know why we are doing this. – Person A

Many things are done on the go, and you can't train them or transfer from someone else because, for example, quite a large portion of the work is project-based, which is very different in every single case, so you cannot train someone that. Now you are in the project, and this is how you do the project documentation because even that one is different in the different projects. – Person A

The interviewees were not familiar with roadmaps and structured descriptions, only a few mentioned that there are some in use. One person mentioned ARIS as a roadmap for processes, adding that all teams have access to each process. In general, most of the teams lacked a structured way of handling onboarding and storing the information, at least on some level. Many observed that instructions are not role-specific, varying either on a task or a legal entity level.

We have ARIS which is the road map of the process. It's quite overall but still a roadmap. – Person D

We don't have any centralized roadmap for the training. For example, we have these generic work maps for onboarding someone, but otherwise, it's usually task-based. The person is usually trained for the responsibilities, and the reason behind that is that usually, [we] are in quite a hurry with onboarding. – Person A

#### **4.1.2 Learning approaching**

The observations from the interviewees offered insights into the training and KT processes within teams. The interview questions were covering KS methods in teams and interviewees were asked to describe KT processes. The results explained how tailored workshops allowed people to ask questions and seek clarification. In cases with new processes, teams are trained simultaneously. Interviewees confirmed that this approach ensures consistency in knowledge skills. Some, but not all, described how the substitution testing works intending to validate instruction functionality in practice.

The common outcome was that KT begins with the onboarding of a new team member. The general training is provided by the person currently handling the responsibilities the new member will take. For the deeper perspectives, key users and process owners provide their training.

The workshops are good. The [team members] can ask questions. If they have some specific cases or some more tricky parts, you can tailor these topics in a way that answers those needs. – Person A

When we have a new process or system change, then the whole team is trained at the same time. If we have some development going on, that's the same thing, that we are training as the whole team. Everyone receives the same training. – Person A

We have a substitution testing. Substitution testing is to make sure that the instructions are in place and instructions are not individual-oriented. It doesn't belong to this person, but it belongs to the entities.

Anyone can jump in and handle the entity. Of course, there are some differences but 90% of the work will be done regardless of the name. And this is done in a very detailed way in writing the instructions. In substitution testing, we choose one month where some person, as a substitute, jumps in and tests the instructions and makes sure that it works. – Person J

KT starts when someone joins the team. Then we start to transfer our knowledge to that new person. Usually, it starts so that the team lead that is the first person that gives the introduction and onboarding going through the more general topics: What is our team structure? How are we working? What are our tools? ... We have a certain material that we present to that newcomer [...] whatever that new person is going to take on his or her responsibilities, there is a person currently doing the tasks. That person is then responsible for giving the training giving the insights and introducing the new activities for the new team member. Then we have for example process owners and key users who might have a little bit wider knowledge about our processes. They usually also give their introduction to the processes in a wider perspective, so that the specialist doesn't do all the different tasks in the process. It's multiple persons involved in the newcomer onboarding. – Person H

We have different ways of how to share the knowledge and how to share the information depending on what type of knowledge we are sharing. If it's, for example, something ad hoc related, something that needs to be communicated right away, then we could be using, for example, the chat rooms, depending on what target audiences we want to reach. The pre-made things are something that we are discussing on a topical matter. For example, we have this working process, a playbook where we have in a wider sense, the different systems that we are using what type of activities are done in those systems, and what kind of different roles we have in the different systems. – Person H

#### **4.1.3 Communication and Cooperation**

The theme around communication and collaboration showed valuable insights. Several comments highlighted the importance of cross-team collaboration and the impact on others when sharing information is widely utilized. Few commented on the communication challenges where different terms led to varied understanding. It was implied that cooperation is not fully reflected in the organizational behavior, resulting in a need for a more collaborative approach within all areas of work to keep the KT as an ongoing matter.

Other highlighted points were about the external factors affecting team satisfaction and notes on too many changes in a short time frame, impacting KS. These are impacted by the company wide decisions. Face-to-face- discussions were beneficial in terms of more comprehensive communication.

I think it's always good to have these cross-team sessions. Because one piece of information might reach the other team and it might impact our side as well. I think that the cooperation between the teams, with this stream of cross-function information sharing, is a good way. – Person A

I have noticed in some discussions that people are using a little bit different terms and they might understand it differently. – Person E

If people would understand that in this company, we're all in the same boat. If you rock it from one side, it's going to rock from the other side. What are the values of the company? One of them is we cooperate,

but honestly, I don't see that cooperation. People just say that that's not my responsibility and I think that's one of the behaviors that needs to change to have better cooperation. – Person D

We get the most people satisfied with the work, but I think many of the things that for example are unsatisfying in our team are probably coming from outside of GFS, like a company-wide decision or company-wide performance or some kind of stakeholders or service providers. – Person H

We have a Google sheet, where we list challenges to whom it relates and the action points. We don't do other documentation after it is discussed through. Clearly, in some cases this is not the best way, as that way some important information from training or onboarding can be missed, forgotten to mention, as it isn't stated anywhere separately. – Person L

Two big changes in the small-time frames should not happen. A lot of changes at once. - Person D

## 4.2 Motivation factors for knowledge transfer

The second dimension, motivation factors presents motivators for KT. It touches on topics such as a supportive team environment and building a learning culture. Many psychological factors and individual features in people's attitudes were named as motivators. There are two identified themes: (1) Motivators for knowledge sharing and transfer and (2) building a learning culture.

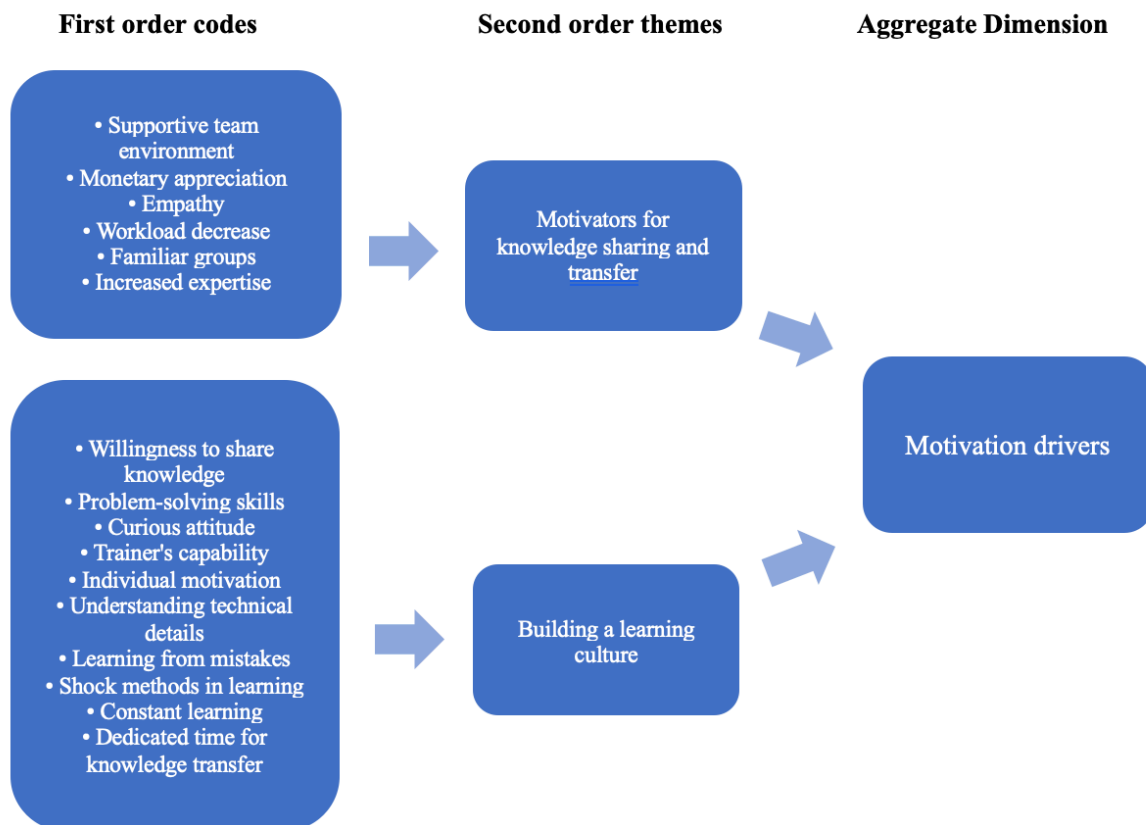


Figure 6. Motivation drivers

#### 4.2.1 Motivation drivers for knowledge sharing and transfer

Interviewees were asked questions about motivators and significant advantages of KT. Interviewees highlighted money as one of the motivating factors, but not the most important. Some noted how KT creates fairness. The following comments were received:

KT mitigates our misunderstanding, and it goes to the root. When everyone is getting the same information at the same time, it stops ambiguity and creates fairness. – Person F

Adaptable, and able to react to different situations. The passion, the desire to help the business and not be like a brake. Sometimes, for a reason beyond our control, we are forced to act as a brake, which we should not be under any circumstances. Adaptable to changes, fast, quick to react, and always ready to serve. I think these would be good points for the success of the support function. – Person M

Money is always a good motivation. STI goal regarding the topic. That one is not guaranteed because we see that even though we have different STIs, it doesn't transfer into the action. Usually, it needs to come from somewhere else. Some kind of engagement of the team is crucial for this type of thing. For example, if you would like to start some kind of KT initiative or a project. – Person H

Motivation comes in many things like there is heavier appreciation and moving up the career ladder. Then, of course, monetary appreciation. The person can be appreciated psychologically appreciation to being named something or just given a bouquet of flowers, in a very big meeting, and to thank this person for this matter. – Person J

Many interviewees discussed psychological motivation factors in KT, such as caring for colleagues and trying to decrease the workload for them in cases of absences. They mentioned smaller groups for an easier way of transferring knowledge and having a space for asking questions without pressure.

Something could suddenly happen with health. Then one person needs to go away. Would you want your colleagues, your friends (you still have kind of friend colleagues at work) to be in trouble? You would like them to have an easy way to substitute for you because somebody has to do the work and it's going to be your work friend who's going to do it. Do you want them to be in trouble, not knowing what to do, or do you want to give them all the tools to help? – Person N

KT benefits everyone. For example, if there's something a person who knows a lot and is not leaving the company. He or she just needs to share the knowledge. It will benefit all people in this case because you get a person who knows more, and people can help and share the workload with you. But then, of course, maybe you don't feel so important anymore, but you get colleagues who can help you with stuff. And feel more confident at work. Most likely the work is more fulfilling. I think it benefits everyone. But I guess it's not made very clear to everyone that it might be beneficial, and more effort could be put into onboarding. – Person K

Open your mouth especially if there is a smaller group. There won't be any such pressure. Instead, there would be a suitable, familiar group with whom you could then reflect. In the smaller group, people have

dared to ask some stupid questions, and they have also dared to answer. Although they are not quite sure, in a way, a discussion has been born through that, and people have brought their contributions to it. – Person L

I would say I would trust more of us speaking out loud and trusting people. Free talking because it's so important that people feel safe. Maybe it would be a good thing that we would have some kind of a big list of tasks you must go through and just tick the box: Have you understood? Have you done this? – Person B

That [anonymous feedback] would be one way to ensure that everyone's voice is heard because it's understandable that some people may not want to raise certain topics. They don't want to say if they are dissatisfied with something. It's still important to raise because otherwise, we are not able to help. – Person A

Many responses covered the topics of having feelings of higher self-confidence and fulfillment after increased expertise about KT. The performed tasks were more comprehensive to team members, resulting in a higher work quality.

The main driver is that the team has a good knowledge of the processes, and the tasks are done in good quality. With no corrections needed. It's good to share the knowledge because then the whole team is going to get richer with that knowledge. From the user side, it's your own need that you are doing your job, and you have the support for that. You need the knowledge to do that. – Person A

The work gets done and it gets done properly in the sense that there are fewer mistakes. If everyone knows how everything is supposed to be done, it increases the quality of our work. – Person D

#### **4.2.2 Building a learning culture**

Many questions about motivating factors led to the replies about learning culture. There were several replies stating that there are differences in people's capabilities who are training others, emphasizing that this wasn't related to attitude but rather to abilities to transfer knowledge. Some people are good at explaining things to others, while others might possess a lot of information in their minds but struggle to share that.

Some people are good at teaching things to others. And some people know everything but only in their heads. They are not able to transfer this to the other person and it is not because they don't want, but they just can't. – Person J

That's a very important thing that the person who knows is willing to share it. And then the other way around. The person who is taking a task needs the knowledge is curious, wants to learn, and isn't afraid of raising questions if something doesn't make sense. In the training then I would say that they have the chance to get a good understanding of the topic. And then the same way from the trainers' point of view, if they want to share the information if they want to ensure that the person understands and has a good and deep understanding, it is going to succeed. – Person A

We don't give enough time for KT when onboarding someone new. It's too rushed. Then that doesn't lead to good results. I've seen in some cases in this company, that there's not always a positive environment. I

usually try to create an environment where it's easy for everyone to ask questions for example, let's say dumb questions. I think all questions are relevant. I try to create an environment that's positive and encourages people to ask questions because sometimes Some people might. react to certain questions in a certain way. That's not very encouraging for the person who's getting onboarded. That also leads to asking fewer questions and then not understanding fully what they're doing. – Person K

I would say that just blocking the calendar for those days [learning and updating instructions]. so that's my answer, to force to have time. - Person B

Interviewees noted the significant role of support from the organization in willingness to share knowledge. Many interviewees brought up the role of an individual ambition in motivation to learn. When talking about individual characteristics, curiosity, eagerness to understand, and being not afraid of asking questions were the most mentioned features.

Culture is one thing. Not everyone is comfortable in talking to others. Some people prefer to write messages or email. The other thing, how close is the team together? This helps a lot also in knowledge sharing. The team environment itself and the corporate environment. Is the corporation supporting the knowledge or not? – Person J

People are happy to learn. When they know that what they are learning is something that would be beneficial to them in their world. – Person J

The greatest benefit and I think it is also very important that a person learns something[...] Depends on the individual ambitions how deeply one wants to learn, and do it and wants to move on for example in that kind of role that they are super interested in. Do they want to move later? Then they are motivated to hear about the technical details as well. – Person A

[The first motivator for KT is] team structure, if the knowledge is something embedded in the team, then it works like a clock. The second thing is the people's willingness to share and to do this, not only to be asked by their team lead but because they're willing to do it. And the third thing is the corporate structure or the company structure. how much the company is supporting this. – Person J

### **4.3. Barriers to knowledge transfer**

The third dimension presents factors hindering KT. Through discussions, I asked if interviewees could name good practices or lessons learned to overcome the possible barriers of KT. There is resistance to KS, barriers in communication, and organizational obstacles.

There are two identified themes: (1) resistance to KT and (2) organizational obstacles.

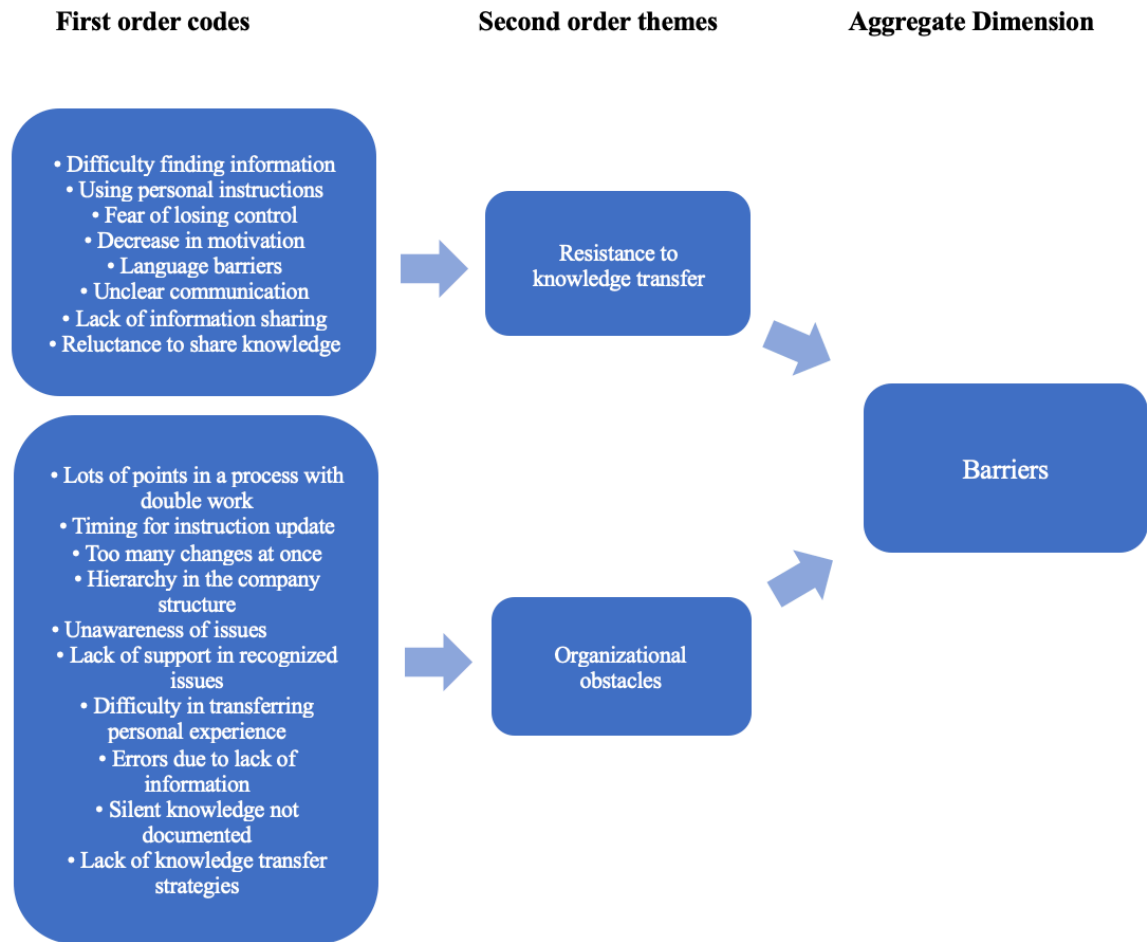


Figure 7. Barriers to KT

#### 4.3.1 Resistance to Knowledge Transfer

This theme presents the replies to the questions about the barriers in KT. We discussed thoroughly the experiences of interviewees and what they consider to be the most challenging type of knowledge to transfer. I also asked to describe the common obstacles and challenges hindering KT. There were many comments about the instructions and the same person commented on some points that the instructions are decent, but after a longer discussion came up that they could be better. Interviewees emphasized that instructions don't include dependencies between tasks and the broader context.

The biggest issue is that most people need someone, more help...The instructions are decent. You might be able to do the tasks you need to do. Most likely you would want to understand what you're doing because I don't think that most instructions explain what you are doing, and which different things are affected by that. You might be able to get it done, but you won't have any clue, what you're doing [...] The instructions don't explain enough dependencies between different tasks[...] There's room for

improvement. I don't think that many people understand the broader scope. This is something that's maybe the hardest part of KT. The knowledge regarding how different processes affect other things... – Person K

Human contacts. The most challenging of KT is to know whom to contact. We have tried to put position names or team names into the instructions. If you leave with your knowledge, then the person who is replacing you, won't know. Also depends on what terms the person is leaving. – Person N

All users have to get knowledge to substitute for each other. But in practice, it's not possible because they have different processes. We have different systems. We have different countries and companies. Each company has unique specifics and a unique combination of systems. – Person P

People must have a sense of responsibility. It's not affecting only them if they don't share the information and knowledge. The next person taking over that company would be able to do it in a quality way. Because [he or she would] have proper instruction. – Person D

I've tried to put it in a key that if somebody is substituting, then the substitute would need to have access to better substitute you. When you come back from whatever reason you're away, then you will have everything in order because the substitute knew what to do and how to fix things. But then it's like the response would be that. Yes, but I would share it with my substitutes. I've tried to come up with different scenarios. – Person N

Some information comes in from the chat, then occasionally gets lost. Getting that knowledge to everyone on the team is a bit difficult. Unless someone adds to the instruction. There might be a misunderstanding, that one person thought that I would add it. And then the other one thought that someone else would add it for me. It might get lost there. – Person D

I would say at least three people need to have access to the storage places that we have and probably should have the knowledge of how to do the process. – Person D

Many highlighted the attitude of not wanting to share information as one of the main barriers in KT. The reasons for hindering the information were possibly a fear of losing importance or people's jobs. One of the replies is based on the question of how to transfer the tacit knowledge, so-called silent knowledge. This is recognized as a competitive advantage, and something achieved individually based on either own abilities or motivation. Language barriers were also mentioned in many replies.

[Some] Team members, never share anything they do. Because, maybe, they are scared that they are not going to be important anymore. Now they are the only ones who [know this] and if they share it then, I don't know what they think happened. Even though we say several times that it's not the case. But if they are sick, leave on vacation or anything, the task needs to be done still. – Person A

Some people have the attitude that they will not share what they know. Only they are the persons who know how to fix something. If I discover something I make an instruction about it and I put it on the drive so everyone will know how to fix this problem. We do have people who will find out how to fix something and they keep it to themselves. They don't share it. I don't know what the psychological reasons behind it are. I think it's because they are afraid that their position is going to go away. – Person N

I know that people still have their instructions, having their versions somewhere. And when somebody is leaving, it's risky that those are just deleted forever. – Person A

One is that people are afraid if they share what they know. Someone else will take their position or job. Even though it's clear, that we need more people. – Person N

The special knowledge, we can call a competitive advantage. You cannot ask the person to transfer it because it depends on the person himself or herself. I think it is the most challenging because there is no framework that can be put to ensure the KT. This one is just subject to the person's decision. That I need to share this with my team because I belong to this team, or I want this team to know this which will be reflected in their work. I can do it by the willingness to help. But if I find that I don't even receive any appreciation for this extra work I do or extra knowledge that I transfer, why I will take it? This can also create a negative impact that I will stop even learning myself. If I find that the knowledge is not appreciated in a way, I will do whatever others are doing. – Person J

There can also be language barriers that cause this. Particularly, when we talk about processes, somebody understands difficult technical language for instance, in Finnish or the other one in English. – Person F

People don't want others to feel that they ask a lot of questions. Others might think that they are stupid. This might be a barrier. - Person P

#### **4.3.2 Organizational obstacles**

This theme was identified based on the results after discussions about the organizational impact of willingness to share the information. There was a mention of a need to feel equal. Additionally, other questions led to the comments about obstacles in KT. Interviewees mentioned double work and data in multiple places, the potentiality for automation, the need for proper KT, and its scalability to avoid confusion. One comment was about numerous amounts of exceptions and decisions made externally to which processes need to adapt.

I think about something, which is not easily put into instructions. Different decisions have been made during the different projects. These types of things are then discussed and agreed upon and go forward. There might be cases in that kind of decision on why they are done and why something is not transferred. We usually don't have that outcome on the final solution, but then in the later, we would need to come back on certain things. – Person H

We have a lot of exceptions. Which is a big point in my eyes, and everything is accepted. We have this exception. Then another one comes, and we have another exception and another everything is accepted which shouldn't happen because then we have so many exceptions. And it's humanly impossible to transfer that knowledge even inside the team. Decisions are quite often made before us already somewhere else. And we need to modify our process to fit that decision before us. – Person D

We have a lot of places with double work. You have to check this data here and have to reject the same data in another place. I don't know if it's even possible to avoid this double work or not. Transferring knowledge is a challenge for every person. – Person P

I think one generic at least is the time. Everyone deserves to get dedicated time. To get the proper KT from the experts. They wouldn't be then confused. That one person is doing it this way. And the other person is doing it that way. That can be quite confusing, especially if you are a new person. – Person A

In a big team, it's also hard to engage large groups of people in a common way of working and sharing and storing knowledge and information. – Person H

We should all feel equal, no matter what we're doing. – Person F

## 4.4 Suggestions for improvements

The fourth identified aggregate dimension improvement ideas consists of three themes:

(1) standardization of processes, (2) enhancing KT strategies (3) competence evaluation.

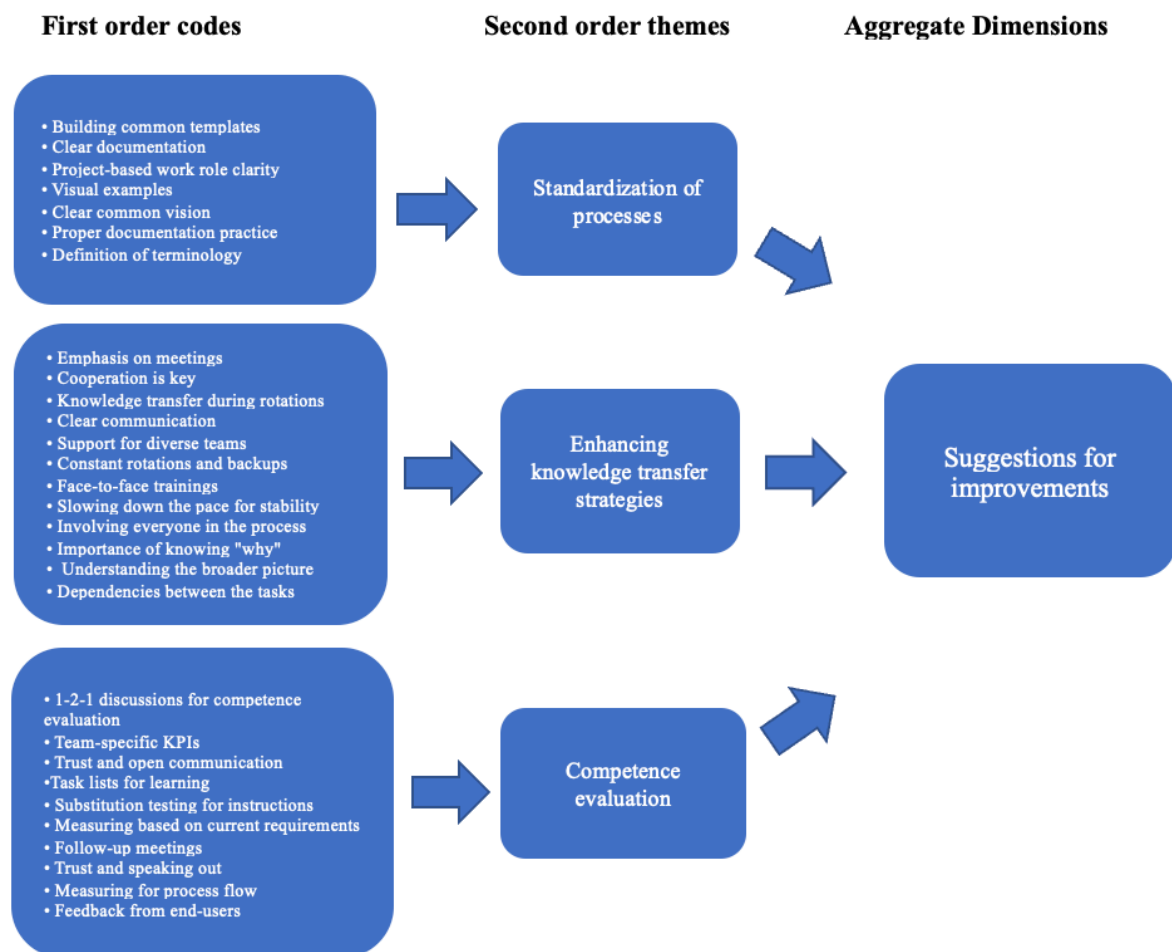


Figure 8. Suggestions for improvements

### 4.4.1 Standardization of the processes

This theme presents suggestions for standardization describing its benefits. Numerous comments revealed how common templates would help different teams understand

activities, processes, and onboarding phases in a structured and comprehensive way. Many comments concerned the importance of understanding everyone having a common goal.

All templates in a standardized way would be beneficial. When we, for example, are the people moving in the different teams. We would know the process and we would know what type of activities there are ahead. And for example, being familiar with their onboarding plan. Building that kind of common template would also be something that multiple people in different teams have been thinking about and getting different views. I see, that would be the best practice. So not everybody would need to invent the wheel. – Person H

Standardized KS, taking up a quality tool to make sure that there is a proper documentation practice. It is just more training, more talking about it. I think it's mainly bringing it to the table. The challenge is finding out that there is an issue. I think that's more challenging than when we know that there is an issue. That's an easy one to remedy. – Person F

The instructions are not fully understandable. In a sense, there might be actions where we have someone created them. Later there is a bit more knowledge about the process. I think there is a rule for improvement in some of the structures as well. They should indeed go a little bit more explaining about the different activities. – Person H

One option would be that we would have a structured way under every single process. – Person A

We should have a clear common vision. We should know on what we are working on. What is our team after? What is our goal? What is expected from us in practice? And we should understand that we have a common goal. We need enough time and resources to invest in KT. I feel like that's the biggest issue. – Person E

Enough resources for onboarding, because in the short term, you might have some delays with daily work, but in the long term, it's going to be beneficial for everyone if a person is onboarded properly and not left-handedly. – Person K

A few comments were about the way of working and suggestions for updating instructions and practicing KT. The comments are listed below:

A new person can go through the instructions and update the instructions because new people see everything with new eyes. – Person D

It should be a project to fix everything and then it needs to be an ongoing thing if something changes. Person M

If you have more than 40 pages, you must understand that a person won't understand everything from the beginning. You have to ask a user: Please read it again from time to time. There might be gaps for you. It's not possible all the time to remember and you can check everything from the instructions. – Person P

#### 4.4.2 Enhancing Knowledge Transfer Strategies

This theme lists suggestions for enhancing KT strategies. Roughly, half of the interviewees mentioned the importance and benefits for everyone in deepening the understanding of a broader picture and how it should be embedded in KT processes.

One core aspect of the quality drop is that some instructions are based on the question of how the task is done. But why we are doing this, no one knows. We are going to this question, why? And sometimes to write instructions reflecting on how and why together. It would be a very lengthy one. The instructions are based on how and then you have supporting calls and meetings, doing the task together to ensure that the Why- aspect is there. Companies don't stop when people leave, but performance and quality, sometimes, stop when people leave. The lesson learned; the KT must be based on the why question. – Person J

Not just for the newcomers, but to remind everybody what we are doing here. It could be very good to have those in face to face or online. Reminding people if something has been changed. To have the big picture because that's important. – Person B

We should make the design together so that everybody can be a part. – Person E

The more the processes flow without any hiccups or information being falling between the chairs. the better it is. To ensure that all relevant information is being forwarded. – Person E

Communication stood out with interviewees emphasizing the importance of sharing information with everyone to avoid errors. Various suggestions confirmed that rotations are the key to enhancing knowledge as well as changing responsibilities from time to time. Many suggested that adaptiveness to constant changes is one of the learning and KS motivation elements.

It could be easier if you are sitting next to each other and doing things together in order to learn and understand. There are challenges in communication. We might not only use different languages but even once speaking in Finnish, in some discussions, people are using different terms and they might understand differently. – Person E

[Drivers for KT] an individual sense of responsibility for the work that I am doing. Also, the experience from many cases: errors and mistakes were made because everybody wasn't informed. At the same time, I also need the correct level of knowledge to understand how different elements connect...teamwork for everyone involved means that, you must ensure that everybody is aware. – Person G

We need to be constantly aware of the fact that someone might leave. And how to transfer that knowledge to the next one. A little bit depends on what kind of activities that person is doing, but that is also something that always keeps on foot that someone might be leaving. – Person H

By changing the role. We have company rotations. That's one of the good sides that then you must learn something new, and you see different ways of working because we don't have a harmonized process. Not only company rotations, but other tasks as well. For example, returning to an old company. If there's been

a time space between, it's still useful because you see what has happened in the company while you were doing something else. – Person D

Increase the motivation by just changing the responsibility. All of a sudden, one month and see, the new person is capable of taking care of a new company or a task based on the instruction. It's a shock method, but I think it would work. – Person D

Slowing down the pace appeared in most of the discussions. Slowing down could have a positive impact, resulting in reducing mistakes due to many things happening at the same time. One comment clarified teams have enough skilled people who can make decisions and no need for consultants in most cases. Many suggested ways for accelerating KT through onboarding and informative meetings.

Too fast pace. It's humanly impossible to do your own job teaching a new person and then learn a new job. Or three things at the same time plus the instructions. Slowing down the pace sometimes is beneficial because then people would have time to learn, would make less mistakes and there would be less chaos. And then even though it's a slower pace, you get a better process. – Person D

We have enough skilled people. We need fewer consultants because we already have the knowledge internally and consultants should only be hired when people from these areas are saying that we need a consultant. – Person N

It's good to have one specific person for onboarding. Who is shadowing or teaching a new team member. [...] The person who is teaching a new team member needs to be working or doing daily just focusing on a new team member. In that way, I've seen the biggest successes. – Person K

Put more emphasis on meetings. Go through the issues if not face-to-face then online speaking. I've noticed that there are emails or chats that are very long, and one person is talking about one thing, and the other person is talking about the other thing and they're both using their own specific specialist lingo and lists of demands and understanding what each other are writing. They can be two days. Whereas if you are having a meeting and you're talking it through, it can be spoken in 10 minutes. – Person F  
One thing but then also having the wider knowledge throughout the team on different topics like sharing, the different ideas, and things like that. So, there could be always something that we can utilize even inside different processes that we could utilize that have been done in there in the other projects or the other teams and between the al or between the different projects and so on. – Person H

#### **4.4.3 Competence evaluation**

The fourth theme presents suggestions for measuring competence. Many interviewees commented that measuring methods should be evaluated thoroughly and defined clearly. All agreed that monitoring people won't lead to good outcomes. The results showed how evaluation should be based on the pre-agreed metrics.

There's a fine limit, to what you can do when you follow, and people can handle it so that it doesn't start to insanely annoy them. – Person M

We have a big issue in that usually, we are focusing on the first part of the knowledge, which is the task performed. But the quality is not the same from one person to another. And this one is unfair to measure. If you have a superhuman, that is doing many things and most of the stuff, of course, that would be reflected on performance. And then the next one who will come, he or she is not required to achieve this level of performance. So, for many people that would be considered as a performance drop. But this aspect is an individual difference, so it is not subject to judgment. We need to make sure that we judge based on what is required, not on what was done before. – Person J

If you want people to stay here, no one likes being watched. Instead, you can give feedback. – Person L

We should measure but the follow-up should be an official process. When asking the new people: Do you understand? Do you have questions? Usually, people say that they don't. But that's the struggle. When it comes to onboarding new people. If you ask them, do you understand they say yes, but then five minutes later, it might be, that they didn't. But that's like a human-specific thing. I can't force anyone to ask me questions or tell me that they don't understand. – Person D

There were both positive and negative comments about measuring competence. Interviewees shared the same views of the needed learning follow-up, noting the importance of understanding where the support can be provided. Interviewees recognized that currently there are no specific follow-up practices.

It would be good because we would know, who knows what? And we would know where we should insert better knowledge. But on the other hand, it would make people feel like they're being observed. – Person N

To understand the best way this person could be trained. We have different ways of understanding. You need a fundament, which might help you to grow your knowledge. All information should be related to the previous steps. If you provide something you have to come back to basics again. This is how knowledge might grow. Theory practices and then checking the process again. Do you understand now? Maybe you could ask? Could you please explain the process? How do you understand it now? And who's responsible for it? What do you understand? What are you responsible for? Could you please explain me? Discussion is important. – Person P

We don't know how people investigate something. We don't understand what's going on inside other people's brains. It's important to understand how you could support them. It would be great if someone could provide the feedback. Basically, asking questions means, that this person is trying to grow and understand the process. If there are no questions, it's a first explanation mark that something is wrong. – Person P

We don't have that kind of a follow-up that now all the knowledge has been transferred and everything is in place. – Person H

I don't think I've seen a follow-up for this[ measurement of learning]. The only thing I've seen is that some people might do follow-up themselves. For example, if they have questions about things, they write them up and do a list of things. They don't understand at that moment. And then, in three months, or six months, they revisit this list and see if it's still unclear. Then you get a clear picture of what you're learning because sometimes it's hard to follow up yourself. Do you feel like you never learn because everything is always confusing? But then when you put it on a list and revisit it, you might see some concrete evidence that you have learned something. – Person K

## 5. Discussion

This research concentrated on presenting KT and related theories and how these work in the GFS unit of a case company. The discussion is divided according to the three research questions about the current way of working, the motivation factors, and barriers to KT suggestions for improvements. To be able to have an efficient KT, communication, cooperation, support from the management, and appreciation for the achieved matters act as supportive elements. These were also validated through interviews.

### 5.1 How does KT work today?

The results focus on three themes: training and onboarding practicalities, learning approaches, communication, and cooperation, which emerged from the interviews (see Figure 5). Based on the results, the positive aspect of current KT is that the basics of onboarding are in place in the case company. Teams have versatile tools for creating and sharing instructions. At the same time, it was recognized, that there was a lack of instructions in a uniform way, varying in content and format. The results show that the lack of time reflects on KT's abilities, as it's challenging to keep track of decisions made.

KT starts with onboarding. The crucial roles in this part are performed by specialists who are currently performing these tasks. As onboarding progresses, key users and process owners step in explaining a broader scope. There are trainings for the whole teams arranged when new systems are implemented, and they are considered valuable and informative. However, tailored workshops have proven more efficient for KT due to participants having similar levels of knowledge and skills. That way individuals can ask questions and enhance their learning. Kasova and Melichar (2021) state that hands-on training, mentoring, support, and onboarding are the fundamental areas of KT. They have a significant impact on daily work by improving quality and productivity.

Interviews revealed the great practices of testing substitutions, suggesting that this approach could be more widely utilized across various teams containing different roles and tasks. That would also work as a motivation factor for employee self-development. It was evident that all interviewees valued a well-organized KT. The consistency of keeping the

information up-to-date and a standardized approach in the documentation was expressed as a desired aim.

The comments under the communication and cooperation theme highlight a demand for improved communication, collaboration, and clarity in terminology within the organization. Engaging in cross-team collaboration through sharing information can have a positive impact on understanding own work. Wide communication methods can ensure that everyone has enough information and skills for work performance. Face-to-face meetings prove effective in addressing issues and finding solutions. Dialogs, body language, and writing materials are all essential parts of communication. They form a fundamental process for effective KT. (Ren et al., 2019)

## **5.2 What are the main drivers and barriers to effective KT?**

The results describing motivation factors are divided into two themes: motivators for knowledge sharing and transfer and building a learning culture (see Figure 6). The findings reveal that monetary appreciation serves as a motivator for people. Appreciation can come in various forms and motivation can be seen through equal treatment, applauding, or moving further along the career ladder. The rewards represent both monetary and non-monetary forms. Increased salary, reputation, promotion, and honor can have a significant impact on KT. However, many studies have proved economic rewards don't always act in a way that encourages sharing information. Therefore, it's always a subject to consideration which is the best form for expressing appreciation for individuals (Ren et al., 2019).

The outcomes revealed that psychological factors, particularly empathy and fairness can increase the motivation to share knowledge. It comes from the willingness to ease colleague's workload and share information, benefitting both parties' performance. Many emphasized that engaging in knowledge transfer not only increases self-confidence but also shows improved work quality. Other identified attitude features, that act as drivers for motivation are the ability to react to diverse situations, passion to contribute to the business, and quick to react.

The results indicate that it's good to understand the abilities of those who are training others. Not all can share and transfer knowledge in a way that the receiver will understand and learn. It's important to recognize people who are great at this and help others learn. There are always people with these abilities, and it would be wise to encourage people to use their strengths. Willingness to share knowledge and corporate support are the keys to successful KT.

The results highlighted that team structure and organizational culture play big parts as motivation factors. It was mentioned that when a team is close, sharing information is easier. When there is organizational support and trust, the information flows freely. A supportive team environment and familiar groups provide a great platform for people to raise questions without being afraid of humiliation. Trustworthiness impacts in efficiency of KT. It works so that the recipient is likely to rely on the source's advice when this is considered trustworthy, meaning that behavior elements are always present (Szulanski et al., 2004).

The barriers in KT are divided into two themes: resistance to KT and organizational obstacles (see Figure 7).

The results revealed that people can perform their tasks when it comes to the basics. The work gets done and can be replicated using the provided instructions. However, a significant gap exists in the understanding of how these certain tasks impact others and the dependencies between them. Currently, instructions don't provide an understanding of the broader scope of how GFS's teams' tasks are connected.

Additional findings describing barriers showed how personal attitude plays a big role in KT. When an individual substituting someone receives all possible information, the outcome is reflected in the quality of work, as everything is done properly during another person's absence and there is no need to start with fixing things. The return to work is easier when a person can trust that will be able to continue from where he or she left off.

The results highlighted a resistance to KT in many cases. Some people are refusing to share their knowledge and best practices to others. The interviewees had assumptions that it might derive from the fear of losing positions or feeling less important, despite the

common reassurance that sharing knowledge benefits everyone. Knowledge documentation is impacted by trust and fear of losing special knowledge (Navidi et al. 2017). Some individuals felt less motivated to share knowledge, as they didn't feel appreciation for consistent efforts. They noticed that despite doing less, the outcome remained the same.

One of the identified barriers was noticed to be around people possessing personal instructions or information. In these cases, the barrier doesn't arise from a resistance to share. Instead, for unknown reasons, information rather stays hidden and disappears for good, when people move to another position. The results showed how different language barriers impact heavily on KT. This not only involves people speaking different languages but also affects communication by using different work terminology.

The results under the organizational theme presented various outcomes related to made decisions. The decisions made elsewhere often resulted in exceptions in already existing processes causing possible double work, delays in KT, and challenges in scaling performance. Other comments concerned the team structures, resulting in it being more difficult to engage everyone in big teams to share knowledge at the same level.

### **5.3 What are the suggestions for improvements?**

The results for suggestions for improvements are divided into three themes: standardization of processes, enhancement of KT strategies, and competence evaluation (see Figure 8). The results show that understanding common goals should be embedded in all KT practices. The results suggest that standardizing processes is vital in terms of ensuring proper KT. The best practices, learned from each other, can easily be implemented. There is no need to reinvent the wheel, as was commented in one of the interviews. The standardization is to achieve scalability and therefore enhance the KT (Miskon et. al., 2011).

The discussions under the harmonization theme emphasized a need for streamlined practices and confirming common goals, explaining how they reduce unclarity. Effective KT requires a strategy that relies on clear and transparent methods. To start, a common project is required. The best approach in tackling current issues is to invest resources in KT and recognize its significance, resulting quickly with long-term benefits. Standardization ensures that KT is embedded in each process, making it easier to scale up.

The outcomes highlighted how rotations can significantly improve KT. This might bring resistance among team members, but has been proven through experience, to be a sufficient method of learning new and thinking from a different perspective. Substitute training explains only one type of rotation among others. Argote and Fahrenkopf (2016) define that rotations can be performed not only through personnel but tasks and tools as well. Moving personnel from one unit to another facilitates the transfer of knowledge received in another unit. The same happens to routines and tools if knowledge is embedded in them. Broadening the picture of how individual tasks related to others can be generated from continual updates, rotations, general information sharing, individual attitudes, and organizational support. Lu and Yang (2015) state job rotations as KT tools for tacit knowledge, supported by feedback-providing managers and an enabling environment.

Clear communication and solving issues immediately in face-to-face interactions help avoid misunderstandings. During a hybrid work setup, where people don't see each other daily, many signals are not visible, compared to constant on-site presence. Line Managers should consider how diverse the learning experience is among individuals. Encouragement and understanding of people's abilities and capabilities can result through positive communication.

The results under measuring competence identified certain resistance depending on what is being measured and whether it was pre-defined. Measuring employee's competence would be valuable for identifying support needs and planning tailored training. be included. There is a discomfort associated with being monitored. Challenges arise from unidentified issues. This can be solved once recognized. This should happen on pre-agreed and clearly defined metrics, focusing on tasks and not people's abilities. Additionally, the background capabilities are good to keep in mind, as metrics might then be different.

## **6 Conclusions**

The main findings of this research show that effective KT involves a combination of teaching skills, communication preferences, team dynamics, time management,

willingness to share knowledge, curiosity, motivation, and organizational support. Based on these results, creating a sufficient and constantly updated KT plan would be beneficial.

The successful KT includes the dependencies between communication, trust, reward system, loyalty, ethics, and organizational culture. The following suggestions help to achieve these factors: rotations enhance knowledge sharing and increase motivation, involvement in decision-making decreases hierarchical barriers, and solid relationships among employees and management while emphasizing of importance of knowledge sharing across the organization and sufficient tools (Al-Alawi et. al., 2007).

The research results confirmed that organizational culture has a significant impact on KT. It reflects in communication, sharing knowledge, motivation, and learning encouragement and provides a sign that all parties are involved in achieving common goals. Values were mentioned as the motivators for KT. Organizational values should be embedded in all actions. Showing more trust and care enables a collaborative environment for enhancing learning, communication, and KT. Organizational culture and trust are valuable components of KT. They consist of common values and beliefs and lead to a shared culture. These so-called soft factors enable members to discuss their views openly in a safe environment and motivate them to share knowledge. Knowledge will be likely distributed if the organizational decisions are communicated through personal relationships in the form of teamwork and meetings (Ren et al., 2019; Lombardi et al., 2020).

## **6.1 Practical suggestions**

This research showed that current practices with insufficient instructions and a lack of dedicated time during onboarding can easily be improved by structured and harmonized documentation and centralizing resources to the identified areas. To be able to achieve the state where all is working, dedicated time and resources are required. When carefully planned, everything should also work in critical circumstances. The design could be done together with representatives from each team. Once design and foundation are formulated, adopting new methods of using knowledge is essential. This approach would serve as an enabling engine for KT. If the fundamental elements are not in place, other supportive elements can also fail. Time limitations and a hectic working environment reflect on

KT's capabilities as stress and deadlines don't provide the opportunities to go through what is learned (Sunnemark et al., 2023).

A comment about trusting employees over consultants highlighted the delightful background. There are already skilled people in different teams, and they can solve issues and provide their familiarity with systems, processes, and stakeholders. Internal solutions are often available if the necessary resources are allocated. The needed resources can be gained by decreasing the use of consultants, particularly when they are likely to provide the same advice as what is already identified internally. Wambui et al. (2013) describe that the benefits of KT appear in situations where employees become less dependent on consultants based on already learned practices and gained skills.

The research revealed language barriers, unclear communication ways, and many exceptions as barriers for KT. Addressing these challenges requires a new approach. Communication can be enhanced with narrative training, bringing new aspects of learning. Documented project decisions and lessons learned, cultural changes, language support, and definition of terminology are suggestions for improvements. There should be a collaborative environment where knowledge sharing is valued, and team members are encouraged to seek and provide information. Tacit knowledge, particularly as a competitive advantage, is the most difficult to transfer. It's vital to understand the importance of being appreciated and encouraged to continuously share knowledge.

The research confirmed that a curious individual attitude plays a role as a KT enabler. A proactive attitude often results in the quality of work. Other motivators can be career progression, monetary appreciation and psychological recognition e.g. thanking a team member with flowers in front of others. Appreciation for achieved elements would be beneficial to take as part of the constant feedback process, enhancing the acceleration in people's motivation. Managers are in an important role, in motivating and supporting team members.

Rapid changes might hurt individuals and teams. Companywide decisions and organizational culture impact on KT. There should be more practical methods to utilize change management processes through values and a more balanced approach to the receptiveness

of changes. Navidi et al. (2017) highlight that KT works as an enabler in a successful change management process. Changes are easier to accept with the provided knowledge.

## **6.2 Limitations and Future Research**

This study has certain limitations. The topic of KT is large, and this research is scoped to contain general theories on the topic. The data sample was purposeful and sufficient for analyzing results and providing validated points. I cannot generalize the findings beyond the context, but the case gives good insights into KT for the case company and similar organizations and units. This is only one organization's case within one support function.

For future research, topics around KT could be broadened into knowledge management elements such as relevant data recognition and collection, KT strategies, and the role of organizational behavior. These results could also be used to develop a survey for targeting a wider sample in the same or similar industry contexts. It would be interesting to extend the research to the elements of knowledge that need to be spared for KT and define data on a more detailed level. KT practices and possible new outcomes in the case company could also be investigated further, focusing on the phases after implementation of previously recognized points.

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# Appendices

## APPENDIX 1. CONSENT FORM

### Consent to take part in research

I voluntarily agree to participate in this research study conducted by Tanja Kotselainen from Arcada University of Applied Sciences. I understand that the reason is to gather information from Team Leads and other experts in similar roles of Global Financial Services for the conduction of a research project.

- I understand that my participation in this study is voluntary, and I have the right to withdraw my participation or refuse to answer questions without penalty.
- I have received a written explanation of the purpose and nature of the study and I have been allowed to ask questions related to the study.
- I understand that my participation includes an interview with Tanja Kotselainen from Arcada University of Applied Sciences. The interview will last approximately one hour, and I agree to it being audio-recorded and transcribed. The researcher has the right to take notes during the interview.
- I am aware that I will not benefit directly from my participation in this study.
- I understand that all information collected from me will be treated confidentially, that the researcher will not identify me by name, and that any report on the results of this research and all reports on the results of this study will keep my identity anonymous.
- Faculty and administrators from Arcada University of Applied Sciences will not participate in the interview but will have access to raw notes or transcripts if needed. This measure ensures that they are not negatively affected by the comments I make. The notes and narrations do not contain any personal information that could identify me.
- I have read and understand the explanation provided and have had all my questions answered to a level of my satisfaction.
- I have been provided with a duplicate of this consent form.

### *Signatures*

Name and signature of research participant

Date

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Signature of researcher

Date

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For further information, please contact Tanja Kotselainen at [tanja.kotselainen@arcada.fi](mailto:tanja.kotselainen@arcada.fi)

The form is adapted from Josefine Törnvall's Master's Thesis, 2021

## Appendix 2. Interview guide

### Semi-structure interview questions

How does KT work today in the case company?

What are the main drivers and barriers for effective KT in the case company?

#### **Background:**

1. Describe your role.
2. How long have you been working in this role?

#### **Questions to All:**

3. Describe a way of working to ensure online knowledge sharing in the team.
4. What kind of KT (KT) process & and road map (structure) does your team have?
5. What kind of templates & and documentation there are in use?
6. Does template & process differ between roles (specialist, key user, process owner)
7. Are roles & responsibilities clear to everyone in the team and are within easy access?  
Is there a defined onboarding role?
8. How do you measure the success or effectiveness of KT initiatives within your team?  
What kind of follow-up process there is in use?
9. Could you describe the methods your team uses to regularly share knowledge? In your opinion, what are the significant advantages of effective KT?
10. What types of knowledge do you believe are most challenging to transfer between individuals or teams?
11. From your experience, what are the common obstacles or barriers that hinder KT?
12. Is there an impact of organizational culture on the willingness and capability to transfer knowledge? Describe with a few examples.
13. What strategies or practices have you seen or used to overcome barriers to KT?
14. Are there good practices or lessons learned that you would recommend to improve KT processes?

#### **Questions to employees in new roles within Global Financial Services (GFS), new joiners outside of Neste, and employees working in the same position for longer period**

15. Does knowledge level meet role description & expectations?

16. What is your experience in KT within your team?

17. Do you identify KT structures & road maps?