
BRANDING PORTFOLIO: THE STEVE TRAUTMAN CO. 2010 – 2012

BY HELT CONSULTING & SERVICES, INC.

THE BRAND CHALLENGE: To rebrand the client's image, define a new brand architecture of company/master brand and subbrands, and to set a brand strategy for taking the company to the next level of growth—carrying this out through on-brand marketing iterations.

SERVICES RENDERED:

Branding, Brand Architecture & Brand Launch

Market Research

Platform-Building & Development of Communication Channels

On-Brand Marketing & Social Media

In the fall 2010, Steve Trautman—founder and principal at what was then called Solutions Strategy, Inc. wanted to define and implement a new brand vision for his company. The goal was to rebrand Solution Strategy, Inc. (also known as Peer Mentoring; also known as Practical Leader) in a manner appealing to a more senior level business executive than the company regularly served and to generate larger, enterprise-wide contracts—what he saw as the company's next level of growth. As pioneers in the field of knowledge transfer, the company had an impressive blue chip client list—such as Boeing, Nike, Microsoft, Kraft, Kodak, Intel, and more. But at the time, no formal brand strategy existed. The company's image was muddled by a widely varied, somewhat outdated mix of products; was incongruently aimed at mid-level Human Resources managers; and was burying the “gold” of its products and intellectual property. HeLT was hired to cut through the clutter and define a brand vision that distilled, differentiated, was memorable, and communicated a competitive value proposition to the new target market.

BEFORE: MARKET RESEARCH

None beyond anecdotal.

AFTER: MARKET RESEARCH

PAST & EXISTING CLIENT RESEARCH: INTERVIEWS

HeLT conceived, wrote, fielded, and analyzed interviews of current and past clients of The Steve Trautman Co., to gain customer insight that would inform the C.O.R.E.E. Brand Positioning Process.*

Interviewees	What is Steve Trautman's Current Brand Image? (Their Perception of Steve)
Angela Q.	<ul style="list-style-type: none">• Quick (acumen), good on his feet• fast-paced, high-energy, energetic,• engaging with a variety of people• good business-savvy• depth of experience in his field.• adaptable—reaches to a situation and adapts• direct; he calls it like he sees it. "He's style is not what I would call high on the confrontational scale, but maybe to some people, that might be a little more confrontational than they're used to."• Not just a facilitator, will participate and interject himself—"a good thing"• Respected for his values,• degree of importance that
Jim P.	<p>"I don't have a whole lot of bad to say about him."</p> <ul style="list-style-type: none">• Knowledgeable• pragmatic• real-world in terms of business when you get done with it• Good references. The business world.• No-nonsense (see story in)• Really focused on what we need• very upbeat; "he moves very quickly"• very pragmatic; "What he does is what he does"• Recommended. (Social Verdict)• Philosophically, very aligned with peer mentoring—learning something that resonated
Gideon R.	<ul style="list-style-type: none">• has a good heart and helps people• very confident; he's not afraid• Solid; very principled person• based on—whatever—who he is• When you talk to him, he's very direct• Doesn't take himself too seriously• overboard when promoting something• way that he does that—angry• Very clean-cut guy; you'll like him• Very thoughtful and happy

What is the Stakeholder Mindset & Their Needs from a Consultant?

- I have to do a lot of board retreats and leadership team retreats with REI and other organizations.
- Distrusts/little respect for like most all consultants
- Ideally needs:
 - Someone who is engaging, personable, and connects with everyone in the room.
 - Someone who understands your agenda and isn't trying to push their agenda.
 - Someone who balances the business results and what we're trying to achieve with the softer side and the touchy-feely woo-woo part
 - Someone who truly adds value—you don't leave thinking, "I could have done that myself." They are allowing you and your team to do the work that you need to do, and they facilitate that well.
- We had problems (i.e. rapid growth, gaps in our ranks in terms of personnel, no succession planning, and a lot of silos of info) but we didn't have a process or structure by which to lean on and address it.
- Someone that has expertise in a specific area of need that you don't have in-house
- Someone with credibility
- Pre-vetted: "The hope would be, when you're invited to speak for a group like that, the association had already vetted him out a bit"
- Pre-Vetted/Expertise: "already published a book in the area of talent management/leadership training"
- Pre-Vetted/Good references. "So if you look at his bulk of business, you ask does he have any experience in and with companies that we respect and have similar profiles to us?"
- Credibility dimension: "Someone that has a strong resume and a strong combination of practical and consulting experience. So in an ideal world, someone who has 'been there, done that' and can speak not only like a teacher does—that this is how you do it according to the book—but also 'I've been there, done that.' That's the best combination and the best way I can describe a consultant in terms of credibility for us."
- "Somebody that is, because of our culture, collaborative in nature and able to engage my senior staff in a way that is not preaching with them, but rather collaborating with them on how to be successful and to win them over."
- "Talent Management is pretty new, and for a firm our size to be investing in it is pretty aggressive and innovative."
- "The other reason why I use consultants is that I've sometimes believed that if used right, they're almost more credible than if someone in-house does it."
- Somebody who is a good listener, who has good intuition and can read between the lines of what they're hearing.
- Somebody who is not going to give a cookie-cutter solution that they've given hundreds of other times.
- Analytical—someone who is looking at the information, processing it, and trying to draw various conclusions about what they're seeing
- Results-oriented—some consultants go a little overboard on the process part

First, I prefer to work with a consultant who listens first and doesn't necessarily attempt to apply their preconceived solution, but rather understands the problems that we have and help us think them through better ourselves.

Another important asset is that the consultant has a very high level of technical skill in the area of interest. In other words, I don't have to educate the consultant—they already possess a substantial degree of knowledge in the area. So those are the two things.

*Data in images here, and throughout this document, has been changed to protect privacy and confidentiality.

AFTER: MARKET RESEARCH

“NEXT LEVEL” POTENTIAL CLIENT RESEARCH: SENIOR EXECUTIVE INTERVIEWS

HeLT created, fielded, and analyzed web-enabled 30-minute phone interviews with senior executives to test the brand vision and brand identity decisions made during the C.O.R.E.E. Brand Positioning process.

➡ Examples:

- Dir. of Global Operations of **Citibank**
- Executive VP of Distribution of **Tootsie Roll**
- VP and CTO of **Tupperware**
- VP of Trade Marketing & Marketing Services of **Bacardi**
- CIO of **Old Republic**
- ADAS of Enterprise Systems, Engineering & Operations, **Dept. of Veteran Affairs, U.S.A.**
- Sr VP of Business Research Reporting at **VISA**
- Ex. Producer of Digital Media at **Lionsgate**
- Dir of IT/CIO, **The Economist**
- CIO of **Westwood One**
- and more.

- ➡ Findings reduced the client’s risk of guesswork and informed final decisions about the company’s brand vision & values, revision of the proposed tagline, refinement of their value proposition, and many other insights that used in the company’s branding and marketing.

HeLT CONSULTING
& SERVICES, INC.
“What you focus on grows”

Sr. Executive Brand Testing Research—30
Minute Phone Interviews

Purpose:
To test our prototypes and learn the preferred hooks and terminology to use when introducing Steve’s products to the target market.

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HeLT CONSULTING
& SERVICES, INC.
“What you focus on grows”

Listening Phase II—Executive Interviews
Analysis (31 interviews)

Q1. Open-ended question to define the challenge/core need; see final transcripts.

A lot of explanation of their specific problems and their plans to deal with these issues. Might be of interest to you to better know what’s going on out there.

Q2. Open-ended question on what systems and methodologies, if any, they’re currently using to assess and mitigate workforce risks; see final transcripts.

More of explanation how they assess risk or plan to deal with the transitions affecting their organization. Again, might be of interest to you.

Key Finding: Trend in the Finance/Banking industry for the past 5 years or so has been to form formal risk management teams or positions, called such things as “Enterprise Risk Management Group,” “(2x) or “Chief Risk Manager” and “ Chief Strategy & Risk Officer” Their role is to look at all areas of the business and ask: *what could go wrong?* These positions would be a good place for you to target your marketing efforts in terms of the Finance/Banking vertical.

Q3. Terminology used for this type of work.

Knowledge Transfer	22
Talent Management	15
Human Capital	14
Workforce Readiness	7.5
Workforce Strategies	4
Other (please specify):	Change Management, Adaptive Change Management, Intellectual Capital, Talent Risk Management, Human Resources Preparedness

Q4. Meanings of the terms to them; see final transcripts.

Q5. Familiarity with companies in the field.

	ALL
None	14
The David Allen Company	9
The Steve Trautman Company	5
Dave Delong & Associates	4

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BEFORE: BRAND VISION & VALUES

CLIENT'S GENERAL BRANDING KNOWLEDGE & COMPETENCY

➡ Low.

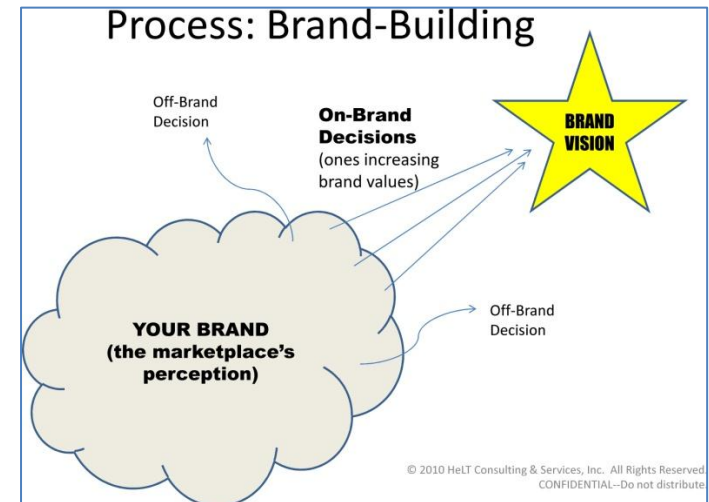
BRAND VALUES

➡ Not defined.

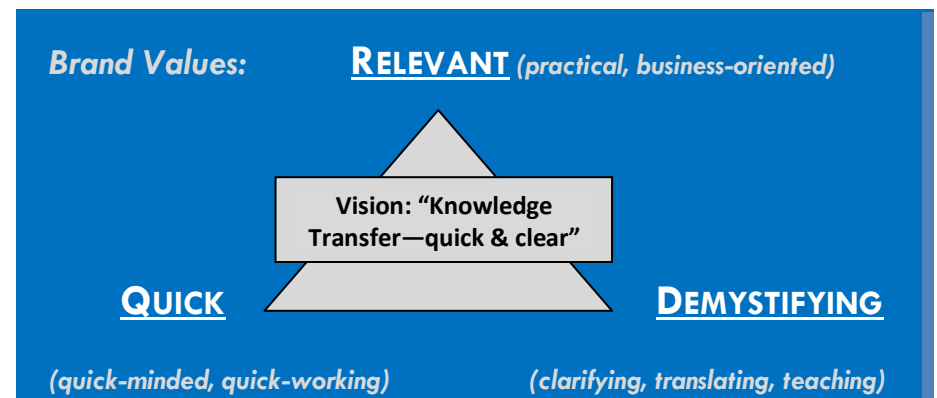
➡ No clear value proposition.

AFTER: BRAND VISION & VALUES

BASIC BRANDING EDUCATION AND TOOLS



C.O.R.E.E. BRAND POSITIONING PROCESS YIELDS BRAND VALUES



BEFORE: BRAND POSITIONING

Not defined. No brand strategy.

AFTER: BRAND POSITIONING

A brand position was defined:

BRAND POSITIONING STATEMENT

THE STEVE TRAUTMAN CO.

is better than

other talent management-oriented business consultants, training programs,
or in-house inertia

to serve

knowledge transfer- and *talent management-ignorant* business executives
who want a *measurably ready, productive workforce*

because The Steve Trautman Co.

creates and provides the simplest framework for methodically assessing and
mitigating the executives' talent management risks—in the areas knowledge
transfer, on-boarding new employees, mentoring, and unique-knowledge
retention

by

being the most demystifying, quick, and relevant option for these executives in
today's marketplace

with the result that

clients feel *confident* and *equipped* with solutions they
can *understand*, can *immediately implement*, and *will work for them long-term*.

BEFORE: BRAND IDENTITY/LOGOS

PREVIOUS COMPANY/MASTER BRAND:

- ➡ The previous logo communicated a value proposition but was not aligned with the company's core competency and business niche—knowledge transfer—lacked differentiation, and did not appeal to its new target market of senior level & non-HR executives:



AFTER: BRAND IDENTITY/LOGOS

NEW COMPANY/MASTER BRAND:

- ➡ A new logo/wordmark was conceived and designed* for the company as a result of HeLT's C.O.R.E.E. Brand Positioning Process. It solved these problems AND was memorable, communicated the client's brand values, and alluded to Trautman's simple 3-step process for knowledge transfer.



SUBBRANDS:

First, the appropriate brand architecture needed to be chosen...

**An out-of-house designer was used; HeLT wrote the creative brief as result of the C.O.R.E.E. branding process and consulted on design.*

BRAND ARCHITECTURE: ENDORSED BRAND STRATEGY & LOGOS

Defining and managing **brand architecture** is one of the most challenging aspects of branding. With an **endorsed brand approach**, the company/master brand (in this case, The Steve Trautman Co.) is a point of reference for all the subbrands under it. The main role of the master brand's "endorsement" is to provide *credibility, differentiation, and assurance* to the client or customer. In turn, the subbrands *build greater awareness and experiences of* the master brand. Endorsed brands can have their own unique attributes but they will still carry certain common values of their master brand.

EXAMPLES:



HeLT chose **endorsed brands** as the brand architecture best fit for The Steve Trautman Co. of three reasons tied to how Trautman conducts his business:

1. **BUSINESS STRATEGY FIT.**
2. **PERSONA FIT.**
3. **MARKETING FIT.**

(Ask HeLT for a more in depth explanation of each reason and why the endorsed brand approach was the right choice in this client's case.)

BEFORE: BRAND ARCHITECTURE & LOGOS

- ➡ No brand architecture strategy in place.
- ➡ No clear way for clients to understand the relationship between the company's products.
- ➡ Only one subbrand had a unique identity:



AFTER: BRAND ARCHITECTURE & LOGOS

HeLT used an endorsed brand approach for the client's subbrands and streamlined the company's products into the easy-to-understand motif of a simple 3-step process.



[STEP 1: Assess Risk]



[STEP 2: Make a Plan]



[STEP 3: Learn to Act on the Plan]



BEFORE: BRAND PERSONA

- ➡ A persona existed, but was not clearly defined.
- ➡ The client was not setting himself apart from a crowded field of consultants who give keynotes and lead executive sessions.
- ➡ Trautman's brand persona was not integrated throughout all aspects of his business and its product lines.

AFTER: BRAND PERSONA

- ➡ HeLT established that Steve Trautman was a "product" and a brand himself—in addition to his company's products—and clearly defined his core brand persona.

THE BRAND PERSONA

CREDIBLE. *He's an expert who trail blazed corporate America's "gold standard in knowledge transfer." He's been at this work for 20 years, and has held positions on both sides of the problem, as a line executive and as a consultant. His client list is blue chip.*

DEMYSTIFYING. *He's a superb educator, communicator, and translator. He takes the mystery out of this work and makes things clear for people. He makes things "simple but not simplistic." People leave him feeling more confident, informed, and equipped.*

QUICK. *Quick-minded, quick-spoken, and quick-working. He's extremely bright and keeps an energetic pace. He can define a problem and come up with a practical solution as fast as almost anyone. He will not waste your time; some may call him hard-driving, but he's action-oriented and conscious of adding real value. His ideas can be explained 5 -15 minutes and you can begin implementing them just as quick. He's high-energy; his presence has a catalyzing effect.*

RELEVANT. *Real-world, not theoretical/academic. Business-oriented, not touchy-feely. He's a listener, learner, and inherently curious. He and his team will be "students of your business," to get the lingo and tone needed to facilitate meetings*

MEASURABLE. *Everything can be measured to ensure its working and there's accountability.... [ETC.]*

BEFORE: BRAND PERSONA

BRAND PERSONALITY

None.

PREVIOUS BRAND HEADSHOT

Trautman's headshot was inconsistent with image he wanted to present to C-level and line executives.



AFTER: BRAND PERSONA

BRAND PERSONALITY

- ➡ HeLT's brand personality exercises revealed the on-brand sweet spot—what was “too little,” what was “too much,” and what was “just right” for his brand persona.

NEW BRAND HEADSHOT, PLUS “ACTION SHOT”



TRAINING & IMPLEMENTATION FOR EMPLOYEES, SUBCONTRACTORS, AND STRATEGIC PARTNERS

- ➡ HeLT created a **Brand Primer** to introduce new employees and collaborators to the client's brand and ensures consistency & focus.

AFTER: ON-BRAND ANCHOR COPY

HeLT wrote a comprehensive document of starter on-brand marketing copy—“anchor copy”—that could be used by Trautman’s marketing team to create collateral (e.g. website, brochures and email messaging, etc.).

For further support, HeLT translated this into certain tactical brand iterations....

ANCHOR COPY

COMPANY INTRO

At **The Steve Trautman Co.** we are knowledge transfer experts. We provide business executives with the simplest, most relevant, and quick solutions for knowledge transfer. We understand that knowledge transfer isn't just on-the-job training but also moving the wisdom and tacit knowledge of critical professionals into the heads and hands of their coworkers. For nearly two decades our proven tools have helped Fortune 500s and 1000s—in industries such as high tech, manufacturing, finance, energy, government, and communications—assess risk, internally share knowledge, and reduce the loss of talent and experience. We've rolled out large scale and enterprise-wide projects for blue-chip clients such as Boeing, Nike, Microsoft, Electronic Arts, Zynga, Kodak, Honeywell, Southern Cal Edison, FMI Mining, the U.S. Armed Forces, and more.

What sets us apart from other firms is our ultra-clear, practical framework for risk management in the areas of human capital and workforce talent—and our nearly 20 years of experience. We know knowledge transfer. Founder and Principal **Steve Trautman** has been a pioneer of the field since the early 1990s, when he developed the first company-wide knowledge transfer/peer mentoring program for engineers at Microsoft. Today his 3-step knowledge transfer solution is the recognized gold standard for corporate America. This process will typically retain and cross-train more than 90% of a company's unique knowledge.* We can show you how to mitigate such workforce risks as aging and/or departing experts, slow ramp-up to productivity of new hires, and employees with siloed or trapped knowledge.

*See case studies for Nike, Edwards Life Sciences, and FMI Mining—or ask us about our results in other industries.

USAGE SUGGESTIONS

→ For website homepage (but break up these large paragraphs); no need for the asterisk online, just link

→ Also on homepage, use short links such as: “[Is Your Company at Risk?](#)” (links to assessment) and: “[Who is Steve Trautman?](#)” (links to bio)

ELEVATOR SPEECH—1 FLOOR VERSION

“At **The Steve Trautman Co.** we are knowledge transfer experts. We provide business executives with the simplest, most relevant, and quick solutions for knowledge transfer.”

ELEVATOR SPEECH—10 FLOOR VERSION

“At **The Steve Trautman Co.** we are knowledge transfer experts. We provide business executives with the simplest, most relevant, and quick solutions for knowledge transfer.

“Our 3-step knowledge transfer solution has proven itself in a range of industries and with blue-chip clients. In Step 1, we give you an ultra-clear, practical framework for assessing your workforce talent and capability risks—resulting in a quick, easy-to-read visual of your organization’s critical knowledge gaps. We call it the **Knowledge Silo Matrix**—and it not only identifies your “code red” risks due to increased demand, overtaxed experts, or aging workers, but also shows who in your organization needs cross-training or on-boarding and in what specific knowledge areas.

1 | Page

Trautman Branding: Before & After

11

AFTER: TACTICAL ITERATIONS OF THE BRAND

SPEAKER'S PACKET



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Steve Trautman

Knowledge Transfer, Quick & Clear

... corporate America's foremost Knowledge Transfer expert

Speaks On...

- Knowledge Transfer**
 - Across Generations
 - For an Aging Workforce
 - For Research & Development
 - For Onboarding & Retention
- Executive Development**
 - Demystifying Talent Management for Line Executives
 - Leading a Culture of Knowledge Transfer

We understand that you expect a speaker to provide relevant ideas that have been road-tested, just enough theory to prove depth, and a host of practical takeaways—by an entertaining, engaging, and challenging expert.

Steve Trautman is all this—and more.

Trautman is corporate America's foremost knowledge transfer expert, and for more than two decades he has provided business leaders with the simplest, most relevant, and quick solutions for knowledge transfer. His pioneering work in the field is now the nationally-recognized gold standard used by blue-chip clients ranging from Microsoft to Nike, Boeing to Zynga, as well as many in the nonprofit and public sectors. As Founder and Principal of The Steve Trautman Co., today he and his team provide executives with proven frameworks and tools to assess workforce risks, internally share knowledge, motivate talent, and reduce the loss of unique knowledge and experience when employees leave or retire.

Trautman speaks internationally and gives keynotes to wide range of audiences, including those in high tech, manufacturing, finance, retail, energy, government, and the communications industries.

Angie Owen, VP of Merchandising, R.E.I.
"Steve is quick, he's fast-paced, high energy, good on his feet, engaging with a variety of people, good business-savvy, and just has that wealth of experience in his field. To me, he's heads and shoulders above any others I've ever worked with."

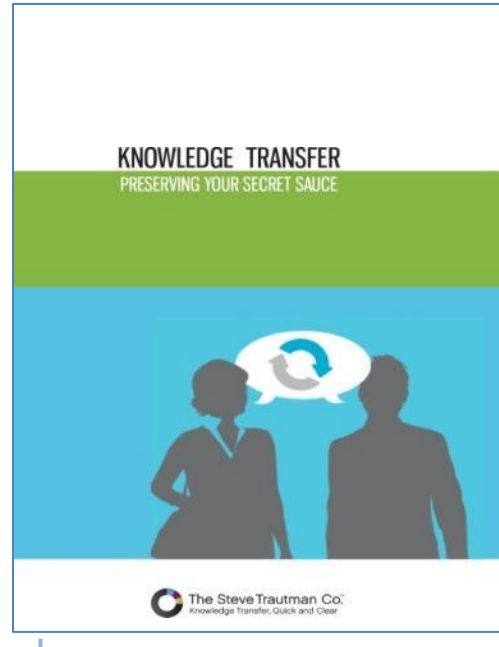
Ralph Turley, CEO of Class Software
"We knew we needed something that really fit in with our company's culture—something earned, overly academic or theoretical... Steve Trautman worked for us."

Steve McConnell, CEO of Continuum Software
"Steve is an excellent public speaker. He has excellent platform skills—a commanding presence, in terms of the craft of speaking, I would put him way up there."

During his first session with our group here, we went through a workshop that at the end of the day, allowed our directors or functional managers to be able to walk out of the room with an Excel spreadsheet—a very simple tool—and be able to go back to their areas and begin identifying where the [knowledge] may exist in their respective departments. So it was a low commitment in terms of time and money and a high return on investment."


Jim Peckham, COO, Cerner

WHITE PAPER



KNOWLEDGE TRANSFER

PRESERVING YOUR SECRET SAUCE



The Steve Trautman Co.
Knowledge Transfer, Quick & Clear

CASE STUDIES



Case Study: Fortune 500 Software Developer Uses Knowledge Transfer to Increase Consistency and Productivity in its Technical Writing Team

Introduction: As a person trained in knowledge transfer, it is not surprising that the client's technical writing team, which was previously struggling with consistency and productivity, was able to increase its productivity and consistency by using a simple, yet powerful, knowledge transfer framework. The client's technical writing team, which was previously struggling with consistency and productivity, was able to increase its productivity and consistency by using a simple, yet powerful, knowledge transfer framework.

The Problem:

- The client's technical writing team was struggling with consistency and productivity.
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- The client's technical writing team was struggling with consistency and productivity.

Our Solution: We implemented the 3-Step Knowledge Transfer process, which includes the following steps:

1. Identify the knowledge to be transferred.
2. Develop a knowledge transfer plan.
3. Implement the knowledge transfer plan.

Key Challenges: The client's technical writing team was struggling with consistency and productivity. The client's technical writing team was struggling with consistency and productivity. The client's technical writing team was struggling with consistency and productivity.

HANDY FACT SHEET/BROCHURE

COLLECTED NAME-BRAND EXECUTIVE ENDORSEMENTS

"You always leave a session with Steve Trautman with something immediately useful."

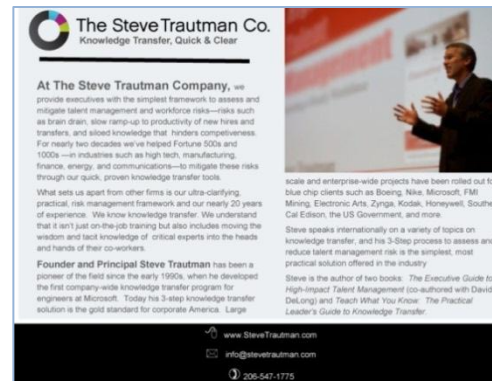
John Sage Director of Employee Communications
The Bill & Melinda Gates Foundation

"Steve Trautman is quick, he's high-energy, good on his feet, engaging with a variety of people, has good business-savvy, and just has that wealth of experience in his field.... To me, he's heads and shoulders above any other consultants I've worked with."

Angela Owen
Senior VP of Merchandising, REI

Learn more about our quick and clear [3-step Knowledge Transfer solution](#).

[Download](#) a free Knowledge Silo Matrix to fill out on your own.



The Steve Trautman Co.
Knowledge Transfer, Quick & Clear

At The Steve Trautman Company, we provide executives with the simplest framework to assess and mitigate talent management and workforce risks—risks such as brain drain, slow ramp-up to productivity of new hires and transfers, and siloed knowledge that hinders competitiveness. For nearly two decades we've helped Fortune 500s and 1000s—in industries such as high tech, manufacturing, finance, energy, and communications—to mitigate these risks through our quick, proven knowledge transfer tools.

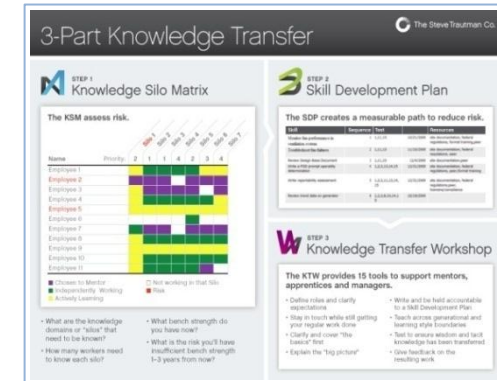
What sets us apart from other firms is our ultra-clear, practical, risk management framework and our nearly 20 years of experience. We know knowledge transfer. We understand that it isn't just on-the-job training but also includes moving the wisdom and tacit knowledge of critical experts into the heads and hands of their co-workers.

Founder and Principal Steve Trautman has been a pioneer of the field since the early 1990s, when he developed the first company-wide knowledge transfer program for engineers at Microsoft. Today his 3-step knowledge transfer solution is the gold standard for corporate America. Large scale and enterprise-wide projects have been rolled out for blue chip clients such as Boeing, Nike, Microsoft, FMI Mining, Electronic Arts, Zynga, Kodak, Honeywell, Southern Cal Edison, the US Government, and more.

Steve speaks internationally on a variety of topics on knowledge transfer, and his 3-Step process to assess and reduce talent management risk is the simplest, most practical solution offered in the industry.

Steve is the author of two books: *The Executive Guide to High-Impact Talent Management* (co-authored with David DeLong) and *Teach What You Know: The Practical Leader's Guide to Knowledge Transfer*.

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3-Part Knowledge Transfer

STEP 1 Knowledge Silo Matrix

The KSM assesses risk.

Name	Project	1	2	3	4	5	6	7	8	9	10
Employee 1											
Employee 2											
Employee 3											
Employee 4											
Employee 5											
Employee 6											
Employee 7											
Employee 8											
Employee 9											
Employee 10											
Employee 11											

Legend: Green = Minor, Yellow = Moderate, Red = Major, Grey = Not in scope for this project.

STEP 2 Skill Development Plan

The SDP creates a measurable path to reduce risk.

Knowledge Area	Current Skill Level	Target Skill Level	Development Plan	Completion Date
Project Management	1	2	Complete Project Management Course	12/31/2010
Technical Writing	1	2	Complete Technical Writing Course	12/31/2010
Customer Service	1	2	Complete Customer Service Course	12/31/2010
Teamwork	1	2	Complete Teamwork Course	12/31/2010
Communication	1	2	Complete Communication Course	12/31/2010
Problem Solving	1	2	Complete Problem Solving Course	12/31/2010
Decision Making	1	2	Complete Decision Making Course	12/31/2010
Time Management	1	2	Complete Time Management Course	12/31/2010
Stress Management	1	2	Complete Stress Management Course	12/31/2010
Self-Motivation	1	2	Complete Self-Motivation Course	12/31/2010
Teamwork	1	2	Complete Teamwork Course	12/31/2010
Communication	1	2	Complete Communication Course	12/31/2010
Problem Solving	1	2	Complete Problem Solving Course	12/31/2010
Decision Making	1	2	Complete Decision Making Course	12/31/2010
Time Management	1	2	Complete Time Management Course	12/31/2010
Stress Management	1	2	Complete Stress Management Course	12/31/2010
Self-Motivation	1	2	Complete Self-Motivation Course	12/31/2010

STEP 3 Knowledge Transfer Workshop

The KTW provides 15 tools to support mentors, apprentices and managers.

- Define roles and clarify expectations
- Develop a knowledge transfer plan
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TRAUTMAN AFTER: MANIFESTATIONS OF THE BRANDING—PLATFORMS

REVISED ON-BRAND WEBSITE

The Steve Trautman Co.
Knowledge Transfer, Quick and Clear

- Is your workforce at risk? Free assessment
- Set up a demo
- Download our Knowledge Transfer white paper
- Sign up for our quarterly e-newsletter

THE CHALLENGE 3-STEP SOLUTION CLIENT RESULTS RESOURCES ABOUT US CONTACT

Enter search terms here

Whatever your Knowledge Transfer challenge, our simple **3-step solution** can help you.

STEP 1 **Identify Risk** STEP 2 **Create an Action Plan** STEP 3 **Learn to act on the Plan**

Try it Free | Learn More | Contact Us

At The Steve Trautman Co. we are **knowledge transfer experts**. We provide business executives with the simplest, most relevant, and quick solutions for knowledge transfer.

Knowledge transfer is more than just on-the-job training. It is also replicating the expertise, wisdom and tacit knowledge of critical professionals into the heads and hands of their coworkers.

For nearly two decades our proven tools have helped Fortune

"We're not like everyone else. Our people have truly unique skills, wisdom and experiences."

[Hire Steve to Speak](#)

NEWS

"You Are Here." Knowledge Transfer Defined

A clear definition of the term "knowledge transfer," as used in corporate America and

[Sound Familiar?](#)

SAMPLE CLIENT LIST

Boeing
Nike
Honeywell
Intel
Kodak

LAUNCHED A NEW ON-BRAND BLOG

The Steve Trautman Co.
Knowledge Transfer, Quick and Clear

- Is your workforce at risk? Free assessment
- Set up a demo
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"You Are Here." Knowledge Transfer Defined

09/20/11
Posted by stadmin

[ARCHIVES](#)

[September 2011](#)

To get our bearings when we're at an office facility, mall, park, or other large complex for the first time, we look for the directory map and then for that little red dot showing: "You are here." In a similar effort to situate this blog and our discussions in the greater world of business, I want to show what we mean by "knowledge transfer" and where we are relative to other terms you may have heard.

The field of knowledge transfer relates to such common business subjects as operations management, communication, risk management, knowledge management, human capital, succession planning, and employee retention—just to name a few. And yet it is none of these. [Read More](#)

Why Another Business Blog? Because Knowledge Transfer Is Happening Near You and It Isn't Usually Going Well

09/20/11
Posted by stadmin

Everyone learns their job in some version of the same way. You bang on the doors of the people around you, wade through the documentation that exists, listen in on conversations, show up at

Knowledge Transfer Today — A [source](#) for knowledge transfer, talent management, and the practice of teaching what you know.

Steve Trautman is corporate America's leading knowledge transfer expert. With two decades of application inside blue chips and Fortune 1000s, his pioneering work in the field of knowledge transfer and related risk management tools are now the nationally-recognized gold standard. He is known for a high energy style that combines humor, street smarts, and board room wisdom. [More about Steve](#)

BEGAN FREE WEBINARS (TO LAUNCH THE REBRANDING & FOR LEAD GENERATION)



STARTED & MANAGED THE COMPANY TWEET ON TWITTER



EXPANDED USE OF LINKED IN



AFTER: BRAND ROADMAP

HeLT created a **brand roadmap**—with evaluation points and checklists—to help The Steve Trautman Co. manage the transition from old to new in the next 1 -3 years.*

PHASE FOUR is CONSOLIDATING GAINS and SHORING UP INFRASTRUCTURE to ensure you can maintain your business at this level. The first round of revising your business to be on-brand gets at the easy changes and opportunities; Phase Four is more challenging because you have to think through your business more deeply and thoroughly to find ways to build stronger, on-brand client relationships. Typical of this phase is an inventory of all your business's customer touchpoints, to find where missed opportunities lie to deliver greater relevancy, speed, and demystification to your clients (brand disconnects). Also in this phase you accentuate what is working, pull back on what isn't, and devise plans to overcome main obstacles to the success of the strategy as identified in Phase Three. You should also be able in this phase to, more or less, codify the below checklist of what is on-brand self management based on your history and evaluations. In addition, note that as your business grows, the range and extent of your obligations will expand. If a ball gets dropped at the level of client engagement you seek—more strategic, higher levels within an organization—the risk of damage is higher as well. So during this phase you not only review customer touchpoints, but also review what weak links exist and changes are needed within your support team to maintain this level of business. Such as: what time efficient, systematic oversight and checks-and-balances can you instill for those selling and delivering your IP? What standards of quality still need to be defined? Without hiring full time employees (as you are reluctant to do), do you have a support person(s) to help you prioritize and make sure you're doing more of the work that you want to do? How can you better use your advisory board? Etc.

CURRENT CHECKLIST

CLIENTS

NEW CLIENTS

- ☐ Client contracts should be over: \$30,000.
(Otherwise, though not off-brand, it's below where you've said you seek to be. Consider the opportunity costs.)
- ☐ Clients should be in one of your **target markets: high tech, manufacturing, finance, energy, government, and communications**.
(You will build brand awareness faster if you develop a presence within a few industries, rather than spread yourself thinly over many industries.)
- ☐ Client should have a sponsoring executive, outside of HR, who is a line executive or above—or you know there are viable options to secure one after contracting, via the HR sponsor's connections.
 - ◆ *Exceptions/Qualifying Filters:*
 - ☐ Potential client is a top-flight brand name in an industry you wish to explore/expand into; should be no more than 1 exception per year
 - ☐ Potential client will be acting as pilot for a new product or approach, or has an intriguing business problem to solve that could result in a new product for your target client base (as needed)

SPEAKING/APPEARANCES

- ☐ Speaking fees should be over: \$2,500

**Data in these images have been changed to protect the client's privacy and confidentiality.*