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Transmitting Generational Knowledge

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Abstract

Generational knowledge loss occurs when retirement-eligible employees depart without transmitting accumulated knowledge to younger employees. The knowledge-loss presents inadequacies if younger employees obtain knowledge on their own instead of gleaning from the experience of the retirement-eligible employees. This article discusses themes found through a qualitative, exploratory, single case study, highlighting transmitting generational knowledge before retirement. It supports the organizational learning theory and the knowledge management theory. The identified themes within the research are knowledge-retention and -transfer of retirement-eligible employees, the benefits and challenges to knowledge-retention and -transfer, the organizational effects of retirement-eligible employees' knowledge-loss, and mentoring and training. A Christian worldview perspective is embedded in the article by incorporating biblical scripture to support the perspective of transmitting generational knowledge. The Scriptures cited highlight the need to seek and gain knowledge to share wisdom. The themes identified herein can be applied to any organization with retirement-eligible employees. Any size organization can use these suggestions to reduce organizational knowledge loss, as the information is infinite and can be applied to support organizational leaders' strategic plans for succession-planning efforts to ensure mission and continuity efforts are solidifiable to support customer needs. This article can be used to support and reinforce succession-planning initiatives before retirement-eligible employees depart.

Keywords: Knowledge loss, knowledge sharing, knowledge management theory, organizational learning theory, retirement-eligible, succession planning

Transmitting Generational Knowledge

Retirement-eligible employees departing without passing on accumulated knowledge presents inadequacies if younger employees cannot gain the knowledge and skills prior to the retiring-employees' departure and thus must learn the knowledge afresh themselves (Messe & Greenan, 2023). Ritter et al. (2023) found that knowledge-transfer opportunities between retirement-eligible employees and the younger generations offer a unique chance to retain knowledge, and employers who engage with employees before their retirement allow for a more productive knowledge-transfer process. Managers and human resources should continually foster cross-generational knowledge-sharing to deal with increasingly age-diverse teams (Messe & Greenan, 2023). Retirement-eligible employees can reduce organizational knowledge loss by transmitting knowledge to the younger employees because older employees, as compared to younger employees, have more experience in the stages of their careers, hold longer organizational tenure, have attained additional skills, and tend to occupy senior-level positions (Fasbender & Gerpott, 2022).

Background of the Problem

The U.S. Department of Labor determined that 44% of the current employed population in the United States will be within the retirement-eligible age range of 65 years old or older by 2028, rendering knowledge-transfer a key driver (Sharma et al., 2022). Between 2019 and 2028, between 60 and 80 million Baby Boomer employees will exit the workforce, equating to 10,000 employees each day, with 30-40 years of experience per employee (Squyres, 2020). The problem occurs when retirement-eligible employees depart without transmitting accumulated knowledge to younger employees, resulting in generational-knowledge loss (Fasbender & Gerpott, 2022). Stable and mature organizations use seasoned employees to transfer knowledge to newer and

younger employees to achieve their goals (Wang et al., 2023). Succession plans permit organizational leaders to resolve problems that should be addressed and pass on tacit knowledge before the retiring employee leaves the organization (Krumnsiek, 2024; Sammer, 2020).

Business Problem Studied

The business problem explored by Cox (2021) was transmitting knowledge transfer before retirement-eligible employees departing within a large federal agency. Generational-knowledge transfer and retention for larger federal agencies were scarce, and a literature gap was identified regarding this generational knowledge transfer and retention topic. Cox interviewed 14 retirement-eligible Baby Boomer employees and 14 leaders of retirement-eligible Baby Boomer employees with at least one year of first- or second-line managerial experience from a large federal agency to study this business problem. Hans et al. (2023) found that up to four generations can work together within our current workforce, supporting better problem-solving and decision-making when sharing knowledge. Each generation has differences in experiences and knowledge, and when the knowledge-sharing transmission is eliminated or diminished, undesirable consequences can lead to lower productivity (Hans et al., 2023).

Methodology

The research methodology included the qualitative exploratory research method design, research questions, the population and sample, informed consent and confidentiality, instrumentation, field test, data collection, and data analysis. Case study research is viewed as a legitimate inquiry form to explore complex issues with a broad view that focuses on social interaction and human behavior, which assist in clarifying the topics of interest (Cleland et al., 2021). This qualitative exploratory single-case research study used multiple data sources to collect interview responses from the research questions for the volunteer participants of

retirement-eligible employees and leaders of retirement-eligible employees, and evaluate theory triangulation, data source triangulation through researcher field notes, and content analysis coding sheets.

Research questions are used to identify what a study projects to answer after data analysis and theme interpretation (Barroga & Matanguihan, 2022). Three research questions were used by Cox (2021) to gather qualitative research from 28 participants, each constructed to explore retirement-eligible knowledge transfer and retention techniques to assist leaders with succession planning efforts:

- R1: How are knowledge-transfer and -retention strategies used in the workplace to produce effective results?
- R2: How is Baby Boomer generational-knowledge transferred to the younger generations in the workplace?
- R3: How are the biggest challenges to reducing generational organizational knowledge loss in essential positions addressed in the workplace?

Data Analysis

Bingham (2023) defined qualitative data analysis as the process of collecting data to elicit meaning and identifying themes, which includes a five-step process of organizing the data, sorting the data into relevant topics, coding the data, identifying themes through patterns and findings, and applying theory and explaining the findings. This study conducted interviews via Zoom and used handwritten notes to capture important points. Recordings were also used to ensure Cox (2021) accurately captured all participants' feedback and enhanced the study's reliability. After the interviews, Cox created a verbatim transcript. After the interviews, the interview data was thoroughly analyzed, and thematic coding was applied using Nvivo 12

software and manual coding (<https://lumivero.com/products/nvivo/>) to identify patterns, themes, similar ideologies, and recurring frequent words. Data analysis triangulation and synthesizing data through comparing and contrasting dissenting and similar ideas were used to identify future research opportunities.

Findings

Cox's (2021) results supported positive suggestions for succession-planning efforts. This article provides business practices and recurring themes to offset generational knowledge loss before retirement-eligible employees depart the workforce. The four themes are knowledge retention and transfer of retirement-eligible employees, the benefits and challenges to knowledge transfer and retention, the organizational effects of retirement-eligible knowledge loss, and mentoring and training.

The first theme—knowledge retention and transfer of retirement-eligible employees—found that leaders of these employee participants agreed that when seasoned employees relay tribal or historical knowledge, knowledge transfer is enriched. This strategy and knowledge can be utilized by capturing written guidance, such as creating standard operating procedures, job instructions, and job aids to be retained in binders and electronic shared drives accessible to employees. The second theme is the benefits and challenges of knowledge transfer and retention. This theme found many leader participants agreeing that a vital benefit to transferring knowledge and retention of knowledge is to support mission continuity. Sustaining knowledge was a similar ideology identified due to leadership not wanting everyone individually to interpret how the work should be performed, but instead agreed knowledge transfer leaves a roadmap to teach precisely how the work duties should be carried out to meet the mission and the way the processes were developed in the first place. The leaders also agreed that an enormous benefit of

knowledge transfer and retention is that mistakes are minimalized and support the prevention of making the same mistakes when developing processes that may have occurred previously. One participant highlighted, “The benefits include the historical knowledge from seasoned employees who can provide insight into previous challenges to present suggestions on how to develop solutions” (Cox, 2021, p. 132). One challenge identified by some retirement-eligible employees involved seasoned employees who do not want to be considered subject-matter experts or do not feel valued by leadership, so they refrain from sharing knowledge on purpose. Another significant challenge is intermediate managers filtering information and not sharing the truth about obstacles encountered within the workforce. A third challenge presented included the chain of command, which may create a barrier to senior leadership hearing the entire truth and filtering information, resulting in the younger employees not having the opportunity to be honest about challenges they encounter in the workplace.

Several succession-planning benefits and incentives can be used to entice retirement-eligible employees to stay, according to Cox’s (2021) participants. Shorter work hours with the flexibility to work fewer hours to focus on training, student loan repayments, and remote work were all included as benefit perks. Leaders agreed that providing more time to train others before retiring is a benefit in providing these employees the opportunity to have a reduced workload so that older employees can train and mentor all support succession planning efforts. Offering retention bonuses, salary adjustments, and performance appraisal bonuses will enhance retention and provide more time for knowledge transfer. Succession-planning challenges highlighted in Cox’s (2021) study detail that leaders should do a better job focusing on showing older employees they are still valued, implementing job rotation and job shadowing to enhance

knowledge transfer, and creating developmental positions to retain incumbents longer in positions to utilize the information received through job training.

The third theme—organizational effects of retirement-eligible knowledge loss—had several participants agree that organizational knowledge loss is created when older employees depart. This leads to many employees, including management, who must be tasked with additional duties when established procedures are not appropriately documented, leading to extra time to perform the work and stress. Retention, performance levels, and organizational performance and reputation are drastically reduced if retirement-eligible employees depart, taking knowledge with them into retirement. The ability to resolve problems efficiently often departs, forcing processes and plans to be developed from scratch. Storytelling experiences of what works well, lessons learned, and what not to do are lost forever. Similar thoughts were reflected in leader participant feedback in that mission failure and customer complaints can entail without proper knowledge transfer and retention planning (Cox, 2021).

The fourth theme—mentoring and training—found successful results in having an older employee mentor junior employees one-on-one, because the dialogue was enhanced with more questions being asked and encouraged. Seasoned-employee participants felt valued by organizational leaders when tasked with mentoring junior employees, and their contributions were respected. Through these relationships, mutual mentorship occurs, and employees share technical advice and explain how technology can advance the organizational processes. However, one participant pointed out that personality conflicts and communication disparities can hinder mentoring (Cox, 2021).

Many participants agreed, providing training to enhance knowledge transfer and retention was favorable amongst all participants' feedback (Cox, 2021). Training is imperative, and on-the-

job training has often been identified as a deficit in many organizations because the mission may slow down if people need to be adequately trained. Training is a necessary component before retirement-eligible employees attrit, as a company's goal is to train replacements before retirements are effective. Leader participants agreed that mission continuity, younger employee clarification of processes, and how they support the mission benefit from training being incorporated into succession planning efforts (Cox, 2021). One participant stated, "Training is necessary to have an educated and trained workforce to be work-ready" (Cox, 2021, p. 110). Job sharing allows a knowledge deposit to transfer to younger employees if older employees are willing to train the younger generation. Younger employees may join the workforce with education but little work experience; therefore, training will enhance their performance because they do not possess historical knowledge. Leaders should encourage cross-training as job sharing is crucial to prevent a one-deep knowledge employee.

Christian Perspective on the Business Problem and Findings

Proverbs 18:15 reveals, "An intelligent heart acquires knowledge, and the ear of the wise seeks knowledge" (*New King James Bible*, 1982). This verse strengthens the need to share and gain knowledge with one another. Scriptures in the Holy Bible provide insight and instruction on transferring knowledge across generations.

Psalms 78:4-6 establishes the accomplishment of teaching children yet unborn and after birth to arise and tell the coming generation the glorious deeds of the Lord, His might, and the wonders He has performed (*New King James Bible*, 1982). In Proverbs 22:6, the act of training up a child in the way he or she should go supports the need to commence the process of generational knowledge as early as possible and the value of planning the learning process methodically. According to Frost (2024), learning the Word of God starts with connecting

novices with biblical content so that they comprehend and internalize the passages and the details. Comparatively, this learning theory is a framework that has been adapted and transmitted throughout generations to underline the role of parental direction and instruction in modeling the principles and behaviors of future generations (Frost, 2024). Joel 1:3 proclaims, “Tell your children about it, let your children tell their children, and their children another generation.”

The transmission of wisdom and knowledge from leaders to the younger generation is illustrated throughout Scripture. In Deuteronomy 34:9, Moses is described as having mentored Joshua by encouraging and training him to lead Israel to the Promised Land (*New King James Bible*, 1982). In Joshua 4:6-7, Joshua desired to provide evidence and wisdom for future generations by depicting a memorial of stones symbolizing a miraculous and faithful encounter at the Jordan. Second Timothy 2:2 confirms that when others have been taught in the presence of many witnesses entrusted to faithful men, the men should have the capacity to teach others also. Similarly, 1 Samuel 16:21 depicts how David came to Saul and stood before him. Saul loved David very much to the point of making David one of his armor-bearers; thus, Saul’s knowledge was transferred to David, who was next in line for kingship.

According to Bodiford and Whitehouse (2020), the comprehension of what learning is and how one learns changes as theories develop. Correspondingly, Doerwald et al. (2021) perceived that seasoned or experienced adults who engage in intergenerational learning report increased levels of purpose., Scripture confirms that even into adulthood, individuals should continue what has been studied and learned as a child (*New King James Bible*, 1982, 2 Timothy 3:14-15),. Transmitting generational knowledge can make an individual wise for salvation through faith in Christ Jesus (2 Tim. 3:14-15). Relatedly, Titus 2:3-5 confirms that older women are to be reverent in behavior and teach what is good.

The biblical concept of mentorship and fostering relationships to transfer knowledge, skills, and experience is fundamental to transmitting generational knowledge across various age groups. Deuteronomy 4:9 depicts the value of not forgetting the things one's eyes have seen and keeping them in one's heart all the days of one's life to make them known to one's children and one's children's children (*New King James Bible*, 1982). When relationships are fostered foundationally on the Word of God, the Truth of Christ can dwell in an individual richly, and that individual can admonish another in wisdom with thankfulness in their hearts to God (Colossians 3:16). The theory of transmitting generational knowledge can be awakened and promoted to facilitate cultural intelligence and consistency.

Conclusion

The business problem Cox explored related to transmitting knowledge before retirement-eligible employees depart within a large federal agency. Four key themes emerged from her study: knowledge retention and transfer of retirement-eligible employees, the benefits and challenges to knowledge transfer and retention, the organizational effects of retirement-eligible knowledge loss, and mentoring and training. The first theme—knowledge retention and transfer of retirement-eligible employees—confirmed that leaders of these employee participants agreed that when seasoned employees relay tribal or historical knowledge, knowledge transfer is enriched. This strategy and knowledge can be utilized by capturing written guidance by creating standard operating procedures, job instructions, and job aids retained in binders and electronic shared drives accessible to employees.

The second theme—benefits and challenges to knowledge transfer and retention—led many leader participants to agree that a vital benefit to transferring knowledge and retention of knowledge is to support mission continuity. The leaders also agreed that an enormous benefit of

knowledge transfer and retention is that mistakes are minimalized and that they support the prevention of making the same mistakes when developing processes that may have occurred previously. Challenges identified by some retirement-eligible employees include seasoned employees who do not want to be considered subject-matter experts or do not feel valued by leadership, causing a refrain from sharing knowledge on purpose. A significant challenge was intermediate managers filtering information and not sharing the whole truth about obstacles encountered within the workforce. A subtheme included chain-of-command barriers from senior leadership hearing and filtering information incorrectly, resulting in the younger employees not having the opportunity to be honest about challenges they are encountering in the workplace.

The third theme—organizational effects of retirement-eligible knowledge loss—highlighted what organizations must deal with when seasoned employees depart. This theme had several participants agree that organizational knowledge loss is created when more tenured employees depart. The departure leads to employees and management assuming additional duties when established procedures are not appropriately documented, leading to extra time to perform the work and stress. Undesirable consequences can lead to lower productivity and diminished optimal performance when employees feel overburdened by heavy workloads. The fourth theme—mentoring and training—found successful results with having an older employee mentoring junior employees one-on-one, because the dialogue was enhanced, with more questions being asked and encouraged. Seasoned employee participants felt valued by organizational leaders when tasked with mentoring junior employees, and their contributions were respected. Through these relationships, mutual mentorship occurs, and employees share technical advice and explain how technology can advance the organizational process.

Succession planning challenges highlighted in Cox's study include leaders doing a better job focusing on showing older employees they are still valued, implementing job rotation and job shadowing to enhance knowledge transfer, and creating developmental positions to retain incumbents longer in positions to utilize the information received through job training. Succession planning permits organization leaders to resolve problems that should be addressed and pass on knowledge prior to the employees' departure from an organization.

Generational knowledge cannot be effectively transferred without encompassing biblical doctrine, cultural methods, and scholarly awareness. The biblical concept of mentorship and fostering relationships to transfer knowledge, skills, and experience, is fundamental to transmitting generational knowledge across various age groups. The theory of transmitting generational knowledge can be awakened and promoted to facilitate cultural intelligence and consistency. Incorporating biblical principles to support transmitting generational knowledge is wise and multifaceted.

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