

# Succession Planning through Knowledge Capture

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2018 PNWS AWWA Conference



# What is the top cost driver impacting the workforce?

- a) Aging workforce
- b) Productivity
- c) Recruitment
- d) Reward and recognition

# Workforce retention is the top issue facing water utilities in the next ...

- a) 1 – 5 years
- b) 5 – 10 years
- c) 10 – 20 years
- d) It's not really an issue

# What percent of the Utilities workforce is on the precipice of retirement?

- a) 5% - 15%
- b) 15% - 25%
- c) 25% - 35%
- d) 35% - 45%

# Introduction

## City of Bellevue Utilities

Nav Otal – Utilities Director

Aleksandra Gancheva – Business Services Manager

Shannon Wennblom – Business Process Analyst

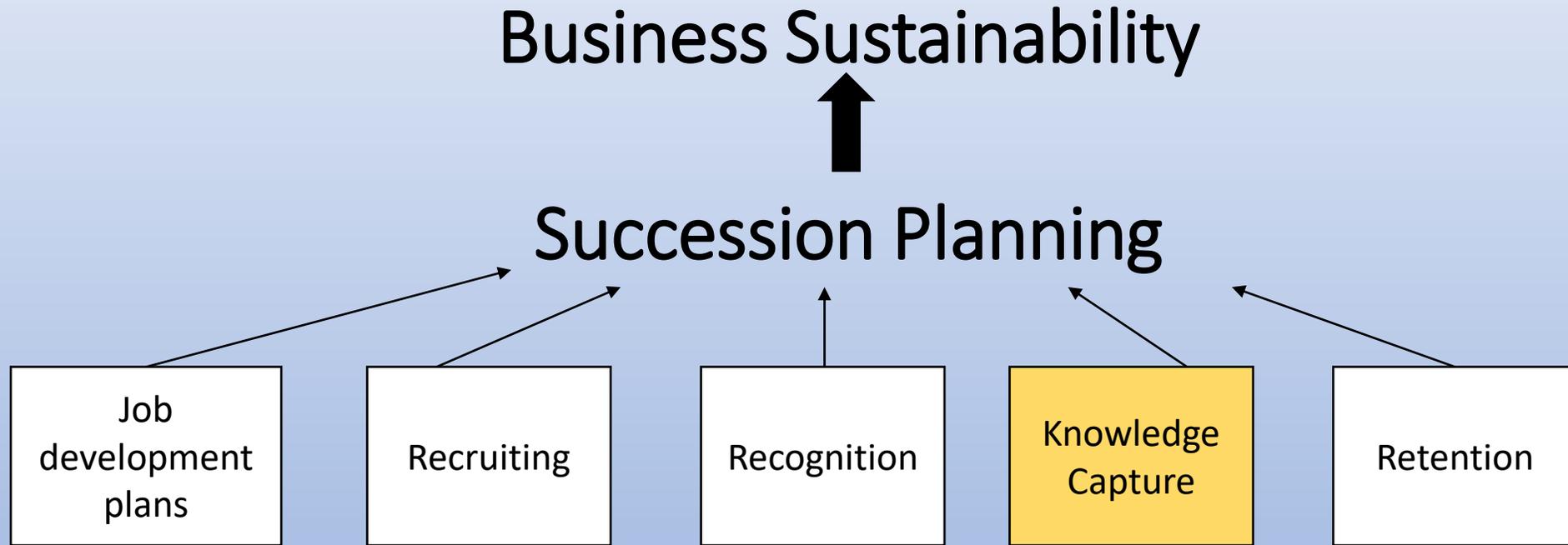


# What is Knowledge Capture?

The process of gathering and documenting critical position information



# Why knowledge capture?



# Presentation Outline

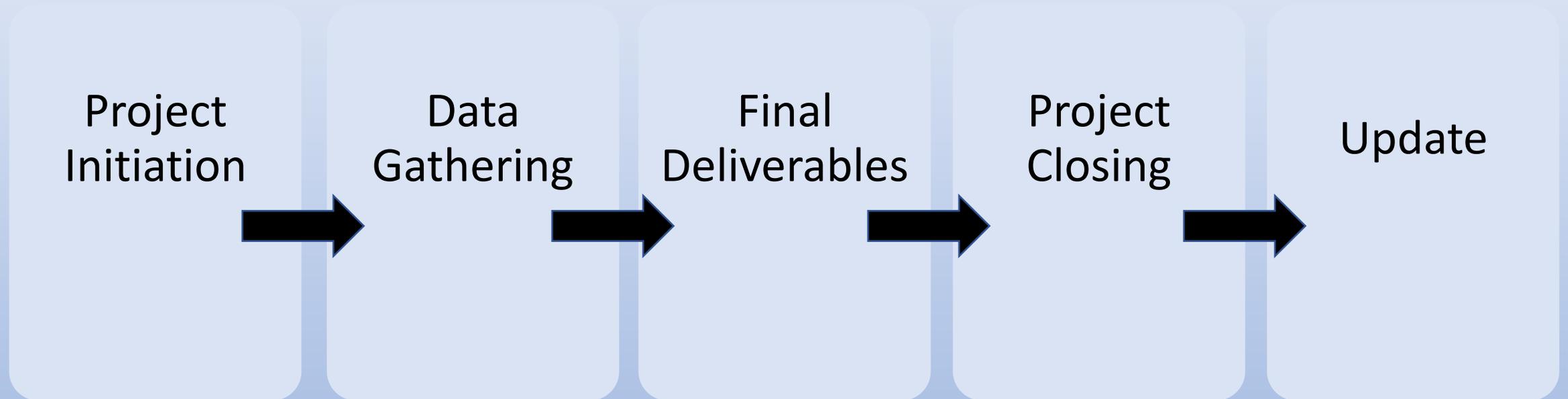
- Our knowledge capture journey
- Process & tools
- Q&A

# Our Journey

- Urgent need for a critical position
- Plan for knowledge capture
  - Identification of candidates
  - Development of tools
  - Individual projects
  - Projects to program



# Knowledge Capture Process



# Project Initiation

## Tool - Project development questionnaire

- Determine the scope / needs
- Identify the top 5-7 tasks for the position



# Project Initiation – cont.

Tool - Project development questionnaire - sample questions

**Length of time  
in current role**

**What are you  
known for?**

**When you are  
away on  
vacation what  
doesn't get  
done?**

**Various duties  
of your job**

**What do only  
you know how  
to do?**

**In terms of  
priority, what  
the top 5 – 7  
things you do  
in your  
position?**

# Project Initiation

## Tool - Project charter

- Agreement
- Stakeholders
- Scope of project / goals
- Timeline
- Communication Plan



# Project Initiation – cont.

## Tool - Project charter - example



Senior Stormwater Planning Engineer Project Charter

Champion/Sponsor: Paul Bucich / Kit Paulsen	
Project Manager: Shannon Wennblom	
Subject Matter Expert: Rick Watson	
Last Update: 4/13/16	
Project Name:	Senior Stormwater Planning Engineer Knowledge Documentation
Organization:	Utilities – Engineering

PROJECT PROBLEM STATEMENTS

Current challenges:

- Critical job tasks are not currently documented for this position which could result in knowledge loss for the organization. The information is important to the organization for the purposes of knowledge transfer and succession planning.
- Files are located in multiple places including I, J, & K drives as well as in SharePoint.
- Special projects (i.e. Sound Transit or 136<sup>th</sup> culvert) cannot be picked up easily by another person. These projects are fluid and change quickly. There is no source that details project status including all decisions made to date. In many cases the projects are owned by other departments.

Senior Stormwater Planning Engineer Project Charter

PROJECT GOALS

**Goal 1:**  
To capture relevant job tasks & knowledge for your position that can be assimilated into a comprehensive resource guide that will be stored in a centralized SharePoint location for all of Utilities. The project will also capture any potential process improvement projects that could be completed in the future.

Deliverable	Timeline
Develop and implement Senior Stormwater Planning Engineer resource guide.	Resource guide completion and approval by 8/8/16.

**Goal 2:**  
To capture all relevant documents for critical tasks and provide a clear path to easily access the information.

Deliverable	Timeline
Evaluate documents, based on ownership / need, and determine which ones or which links should be stored on a position SharePoint site. Ensure structure of the SharePoint site aligns with the file structure project currently underway in the City Clerk's Office.	Complete by project closing on 8/15/16.

ASSUMPTIONS AND OUT OF SCOPE:

- Business process analysis and improvement is not within the scope of this project. However, when opportunities for improvement are discovered they will be documented and shared with the appropriate stakeholders.
- Challenge regarding special projects noted on page one of this document is out of scope but will be captured as a potential future process improvement opportunity.

COMMUNICATION PLAN:

Stakeholder	Role	Description of Involvement/Responsibilities	Project Information	Method	Reporting Frequency	Responsible
Project owner Paul Bucich	Assigns project	<ul style="list-style-type: none"> <li>Assigns project.</li> <li>Receives project status reports upon completion of key deliverables or if project issues arise.</li> </ul>	Project updates	Email	Upon completion of key deliverables, or if project issues arise.	Shannon Wennblom
Sponsor Kit Paulsen	Final review and approval of deliverables	<ul style="list-style-type: none"> <li>Receives project status reports upon completion of key deliverables or if project issues arise.</li> <li>Member of the Core team</li> <li>Provides final review and approval of deliverables.</li> </ul>	Project updates	Email	Upon completion of key deliverables, or if project issues arise.	Shannon Wennblom

Senior Stormwater Planning Engineer Project Charter

Stakeholder	Role	Description of Involvement/Responsibilities	Project Information	Method	Reporting Frequency	Responsible
Project Senior Manager Alex Gancheva	Assigns resources to project	<ul style="list-style-type: none"> <li>Sets project standards and outcomes.</li> <li>Sets performance measures and accountability standards.</li> <li>Provides final quality control and acceptance of deliverables.</li> </ul>	Project Updates	During Check Ins, Email	Upon completion of key deliverables, or if project issues arise	Shannon Wennblom
Project Manager Shannon Wennblom	Manages the project scope, schedule, risk, communication, stakeholders, and team.	<ul style="list-style-type: none"> <li>Identifies actions.</li> <li>Completes and assigns actions.</li> <li>Monitors project team performance.</li> <li>Facilitate Project team meetings.</li> <li>Compiles and provides initial quality control on deliverables.</li> </ul>				
Project Team Rick Watson Shannon Wennblom Kit Paulsen Alex Gancheva	Participate in team meetings.	<ul style="list-style-type: none"> <li>Completes assignments.</li> <li>Develops deliverables.</li> <li>Manages timelines.</li> <li>Provides reports on accomplishments.</li> <li>Review of deliverables &amp; provide feedback</li> </ul>	Project Updates	Email	Upon completion of key deliverables, or if project issues arise.	Shannon Wennblom
Other Stakeholders Pam Maloney		<ul style="list-style-type: none"> <li>Review of deliverables &amp; provide feedback</li> </ul>		Email	Upon completion of key deliverables.	Shannon Wennblom / Rick Watson

Senior Stormwater Planning Engineer Project Charter

PROJECT PLAN

Task Name	Duration	Notes	% Complete	Schedule Status	Start	Finish	Resource Names
<b>OVERALL PROJECT TIMELINE</b>	<b>101 days</b>		<b>0%</b>		<b>Mon 3/28/16</b>	<b>Mon 8/15/16</b>	
<b>Planning</b>	<b>12 days</b>		<b>0%</b>		<b>Mon 3/28/16</b>	<b>Tue 4/12/16</b>	
Review HR Job Description	1 day		100%	complete	Mon 3/28/16	Mon 3/28/16	Shannon
Conduct Initial Interview to develop Project Charter	1 day	1.5 hr mtg	100%	complete	Wed 3/30/16	Wed 3/30/16	Shannon,Alex,Kit,Rick
Confirm key work tasks with SME	4 days		100%	complete	Wed 3/30/16	Mon 4/4/16	Shannon,Rick,Kit,Pam
Populate Dates in Project Timeline	5.25 days		100%	complete	Thu 3/31/16	Thu 4/7/16	Shannon
Develop Project Communication Plan	5 days		100%	complete	Thu 3/31/16	Thu 4/7/16	Shannon
Confirm sub tasks to be used for SIPOC's	3 days		100%	complete	Tue 4/5/16	Thu 4/7/16	Shannon,Rick,Kit
Develop Project Charter Draft	5 days		100%	complete	Thu 3/31/16	Thu 4/7/16	Shannon
Obtain Approval for Project Charter	3 days		0%		Fri 4/8/16	Tue 4/12/16	Shannon,Alex,Kit,Rick,Paul,Pam
<b>Execution:</b>	<b>70 days</b>		<b>0%</b>		<b>Mon 4/11/16</b>	<b>Fri 7/15/16</b>	
<b>Explore System Modeling and Analysis Tasks</b>	<b>5 days</b>		<b>0%</b>		<b>Mon 4/11/16</b>	<b>Fri 4/15/16</b>	
Interview	1.25 days	1.5 hr mtg	0%		Mon 4/11/16	Tue 4/12/16	Shannon,Rick
Send supporting documents, links, etc. to PM	1.25 days		0%		Tue 4/12/16	Wed 4/13/16	Rick
Complete SIPOC's	1.25 days		0%		Wed 4/13/16	Thu 4/14/16	Shannon
Review SIPOC's with SME for validation	1.25 days	via email	0%		Thu 4/14/16	Fri 4/15/16	Shannon,Rick,Kit (cc Alex)
<b>Explore Storm Engineering Standards Tasks</b>	<b>5 days</b>		<b>0%</b>		<b>Mon 4/18/16</b>	<b>Fri 4/22/16</b>	
Interview	1.25 days		0%		Mon 4/18/16	Tue 4/19/16	Shannon,Rick
Send supporting documents, links, etc. to PM	1.25 days	2 hr mtg	0%		Tue 4/19/16	Wed 4/20/16	Rick
Complete SIPOC's	1.25 days		0%		Wed 4/20/16	Thu 4/21/16	Shannon
Review SIPOC's with SME for validation	1.25 days	via email	0%		Thu 4/21/16	Fri 4/22/16	Shannon,Rick,Kit (cc Alex)
<b>Explore NPDES Support Tasks</b>	<b>6 days</b>		<b>0%</b>		<b>Mon 4/25/16</b>	<b>Mon 5/2/16</b>	

Senior Stormwater Planning Engineer Project Charter

Send supporting documents, links, etc. to PM	1.25 days		0%		Tue 4/26/16	Wed 4/27/16	Rick
Complete SIPOC's	1.25 days		0%		Thu 4/28/16	Fri 4/29/16	Shannon
Review SIPOC's with SME for validation	1.25 days	via email	0%		Fri 4/29/16	Mon 5/2/16	Shannon,Rick,Kit (cc Alex)
<b>SharePoint / File Structure Initiative (engage City Clerk's office for support)</b>	<b>55 days</b>		<b>0%</b>		<b>Mon 5/2/16</b>	<b>Fri 7/15/16</b>	<b>Megan,Danelle,Shannon,Rick</b>
<b>Explore Departmental Support Tasks</b>	<b>5 days</b>		<b>0%</b>		<b>Mon 5/2/16</b>	<b>Fri 5/6/16</b>	
Interview	1.25 days	2 hr mtg	0%		Mon 5/2/16	Tue 5/3/16	Shannon,Rick
Send supporting documents, links, etc. to PM	1.25 days		0%		Tue 5/3/16	Wed 5/4/16	Rick
Complete SIPOC's	1.25 days		0%		Wed 5/4/16	Thu 5/5/16	Shannon
Review SIPOC's with SME for validation	1.25 days	via email	0%		Thu 5/5/16	Fri 5/6/16	Shannon,Rick,Kit (cc Alex)
<b>Explore Departmental Support Tasks (Continued)</b>	<b>5 days</b>		<b>0%</b>		<b>Mon 5/9/16</b>	<b>Fri 5/13/16</b>	
Interview	1.25 days	2 hr mtg	0%		Mon 5/9/16	Tue 5/10/16	Shannon,Rick
Send supporting documents, links, etc. to PM	1.25 days		0%		Tue 5/10/16	Wed 5/11/16	Rick
Complete SIPOC's	1.25 days		0%		Wed 5/11/16	Thu 5/12/16	Shannon
Review SIPOC's with SME for validation	1.25 days	via email	0%		Thu 5/12/16	Fri 5/13/16	Shannon,Rick,Kit (cc Alex)
<b>Explore Departmental Support Tasks (Continued)</b>	<b>5 days</b>		<b>0%</b>		<b>Mon 5/16/16</b>	<b>Fri 5/20/16</b>	
Interview	1.25 days	2 hr mtg	0%		Mon 5/16/16	Tue 5/17/16	Shannon,Rick
Send supporting documents, links, etc. to PM	1.25 days		0%		Tue 5/17/16	Wed 5/18/16	Rick
Complete SIPOC's	1.25 days		0%		Wed 5/18/16	Thu 5/19/16	Shannon
Review SIPOC's with SME for validation	1.25 days	via email	0%		Thu 5/19/16	Fri 5/20/16	Shannon,Rick,Kit (cc Alex)
<b>Explore Storm System Plan / Basin Plans Tasks</b>	<b>5 days</b>		<b>0%</b>		<b>Mon 5/23/16</b>	<b>Fri 5/27/16</b>	
Interview	1.25 days	2 hr mtg	0%		Mon 5/23/16	Tue 5/24/16	Shannon,Rick
Send supporting documents, links, etc. to PM	1.25 days		0%		Tue 5/24/16	Wed 5/25/16	Rick
Complete SIPOC's	1.25 days		0%		Wed 5/25/16	Thu 5/26/16	Shannon
Review SIPOC's with SME for validation	1.25 days	via email	0%		Thu 5/26/16	Fri 5/27/16	Shannon,Rick,Kit (cc Alex)
<b>Explore Storm System Plan / Basin Plans Tasks (Continued)</b>	<b>6 days</b>		<b>0%</b>		<b>Mon 5/30/16</b>	<b>Mon 6/6/16</b>	
<b>MEMORIAL DAY HOLIDAY</b>	<b>1 day</b>		<b>0%</b>		<b>Mon 5/30/16</b>	<b>Mon 5/30/16</b>	

# Data Gathering

## Tool – Workload chart

- Key tasks
- Importance
- Time
- Key performance indicators / measures



# Data Gathering – cont.

Tool – Workload chart - example

Table 2: Tasks – Time, Importance, & KPI's (current state)



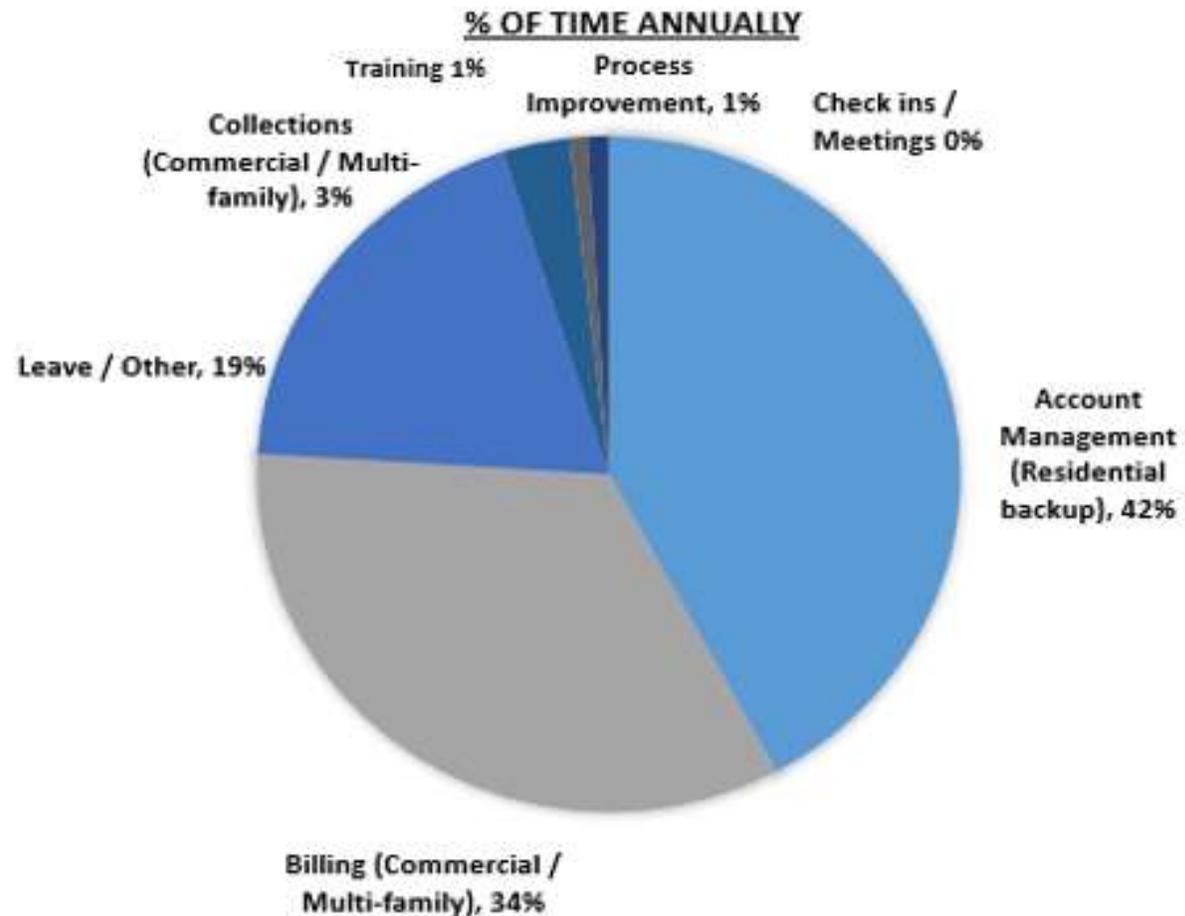
Task	Current Estimated % of Time Dedicated Annually	Ideal Estimated % of Time Dedicated Annually	Importance of Task (H)igh, (M)edium, (L)ow	KPI – Success Measure
Account Management Residential Backup	42%	25%	M	140.0026 Utilities – average customer hold time (in seconds)  140.0027f Utilities – customer satisfaction survey (weekly Customer Service & Billing)

## Data Gathering – cont.

### Tool – Workload chart – example continued

**Key Tasks – estimated % to total annual workload (based on 2,080 hours annually):**

**Current State:** with backlog of commercial & multi-family work



# Data Gathering – cont.

Tool – SIPOC & critical tasks questionnaire



- Written process
- Lean Tool
- Captures all elements of the task

# Data Gathering – cont.

## SIPOC – example document

Project Name	Knowledge Capture – Customer Service Rep - Utilities (Barb)	Utilities Division	RMCS
Task	Special Billing – Deduct Meters	Description / Purpose	Ensures deduct meter reads are captured & entered, billing is accurate and completed in a timely fashion
Frequency	Weekly	Time Required (ideal)	4.5% annual FTE

### General knowledge needed to complete tasks:

- Property contact(s) preferred / current method of communication (email or fax)
- COB does not own deduct meters
- Contact information is located in CIS under the comments tab
- Deduct volume can't be higher than the domestic meter volume at the same location
- **Meters per Cycle** - Cycle 1 = 39, Cycle 2 = 21, Cycle 3 = 5, Cycle 4 = 9, Cycle 5 = 49, Cycle 6 = 0, Cycle 7 = 0, Cycle 8 = 4

SUPPLIERS (Those who provide Inputs)	INPUTS (Knowledge / Materials needed)	OUTPUTS (Final Product / Result of Process)	CUSTOMERS (End Users)
Customer Service Manager	Customer Service Billing Calendar	Accurate / on time billing for deduct meters	Property Owners Customer Service UT Finance
Crystal reports	Deduct meter letters w/ cycle, bill date, letter return date	Issues held out of billing batch, if necessary, until resolved	
Customer Service Rep	Update contact info in CIS  Retrieves deduct meter letters from Crystal reports  Email template for read request  Reviews reads  Follows up on reads that are discrepant or not received		

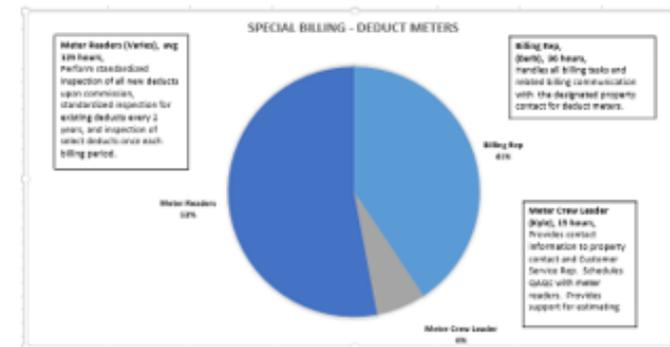
SUPPLIERS (Those who provide Inputs)	INPUTS (Knowledge / Materials needed)	OUTPUTS (Final Product / Result of Process)	CUSTOMERS (End Users)
	CIS entry		
	Request for re-read of domestic meter		
	Review of billing history in CIS to troubleshoot issues		
	Read estimate		
Property owner / Building engineers (or other designated property contacts)	Meter read – photo or digits		
Meter readers	Re-read domestic meters (as requested)		
	QAQC of deduct meters		
Meter Crew Leader	Initial property billing name and address  Customer Service Rep contact info  Issue resolution / estimating support		
CIS	Billing information and reporting		

# Data Gathering – cont.

## SIPOC – example document continued

PROCESS (Steps & Resources Required)
<p><b>New Deduct Meters:</b></p> <ul style="list-style-type: none"> <li>The Meter Crew Leader goes out to the site for a new deduct meter install.</li> <li>The Meter Crew Leader provides the Customer Service Rep's contact info to the property owner and provides the billing name and address to the Customer service rep.</li> <li>The Customer service rep receives the contact information and sets up the information in CIS.</li> <li>The Customer service rep continues to update the contact information anytime new information is provided.</li> </ul> <p><b>Deduct Meter Billing:</b></p> <ul style="list-style-type: none"> <li>The billing process is broken into eight cycles and the Customer service rep refers to the Customer Service Billing Calendar to determine the timing for billing of each cycle.</li> <li>For each applicable cycle, the Customer service rep pulls the deduct letters file from the Crystal reporting viewer and saves to the desktop.</li> <li>The Customer service rep opens eCopy PDF Pro Office on the computer and opens the deduct letters report that was saved to the desktop.</li> <li>The Customer service rep locates the first deduct letter by "finding" the account number.</li> <li>ECopy PDF Pro Office locates the letter, and the Customer service rep proceeds to launch an email using the envelope icon in eCopy.</li> <li>The new email appears in the Outlook email screen and the Customer service rep enters the recipient information, renames the subject line, and adds any additional content to the body of the email.</li> <li>The Customer service rep sends the email, and then repeats the steps above starting with "finding" the next account.</li> <li>There are a handful of customers who have created their own read spreadsheets. For these accounts, the Customer service rep pulls the prior cycle's email and forwards it to the contact requesting the new read(s) (i.e. T-Mobile, Bellevue office park, etc.).</li> <li>The property contacts return the reads to the Customer service rep providing the digits (or a photo of the digits) via phone, email, or fax. (The majority respond by email.)</li> <li>The Customer Service Rep reviews the reads and if they look reasonable enters them by account, in the billing batch, in CIS.</li> <li>The Customer Service Rep notes the read and amount of the bill on the deduct letters / read spreadsheets.</li> <li>Billing is processed as part of the standard billing batch.</li> <li>If the read appears to be discrepant or is not returned, the Customer Service Rep may: <ul style="list-style-type: none"> <li>pull and review the prior billing history for the account in CIS to validate the read or estimate the charges for the current time period</li> <li>contact the appropriate property contact(s) by email or phone for additional follow up</li> <li>request a re-read or photo of the domestic meter, by the meter readers, on the same property to ensure accuracy. A deduct meter should never exceed the domestic meter reading.</li> </ul> </li> </ul>

PROCESS (Steps & Resources Required)
<ul style="list-style-type: none"> <li>If the issue is not resolved, the Customer service rep can: <ul style="list-style-type: none"> <li>Add an estimated read to the account and make a notation that it is a "field estimate" for the time period. Corrections would then need to be made when a read is received during the subsequent billing cycle for the account.</li> <li>Pull the bill from the stack, resend the request for information, manually bill the account, and manually send the bill once resolved. (Shows up on reporting as "no bills".)</li> </ul> </li> </ul> <p><b>Deduct Meter Special Instances –</b></p> <ul style="list-style-type: none"> <li>There are three instances where an industrial surcharge and admin charge need to be added to the account prior to billing (Coca-Cola and Safeway plants).</li> <li>These are removed from the billing batch by the Customer service rep and given to the Customer Service Manager for review.</li> <li>The Coca-Cola plant is also an exception in that it bills early (Friday instead of Tuesday).</li> </ul> <p><b>Deduct Meter QAQC:</b></p> <ul style="list-style-type: none"> <li>The Meter Crew Leader schedules meter readers to perform field inspection for top volume deduct meters every two months.</li> <li>Reads are provided to the Meter Crew Leader and then passed on to the Customer Service Rep for visibility.</li> <li>The Customer Service Rep compares the reads with those provided by the property contact to see if there are any discrepancies.</li> <li>The Meter Crew Leader schedules the meter readers to perform inspection on all other deduct meters every 2 – 3 years.</li> </ul>



Note: Customer service rep's time spent on this task was reduced from 192 hours per year to 96 hours based on a process improvement that was implemented in October '17.



# Data Gathering – cont.

## Tool - People Network Diagram

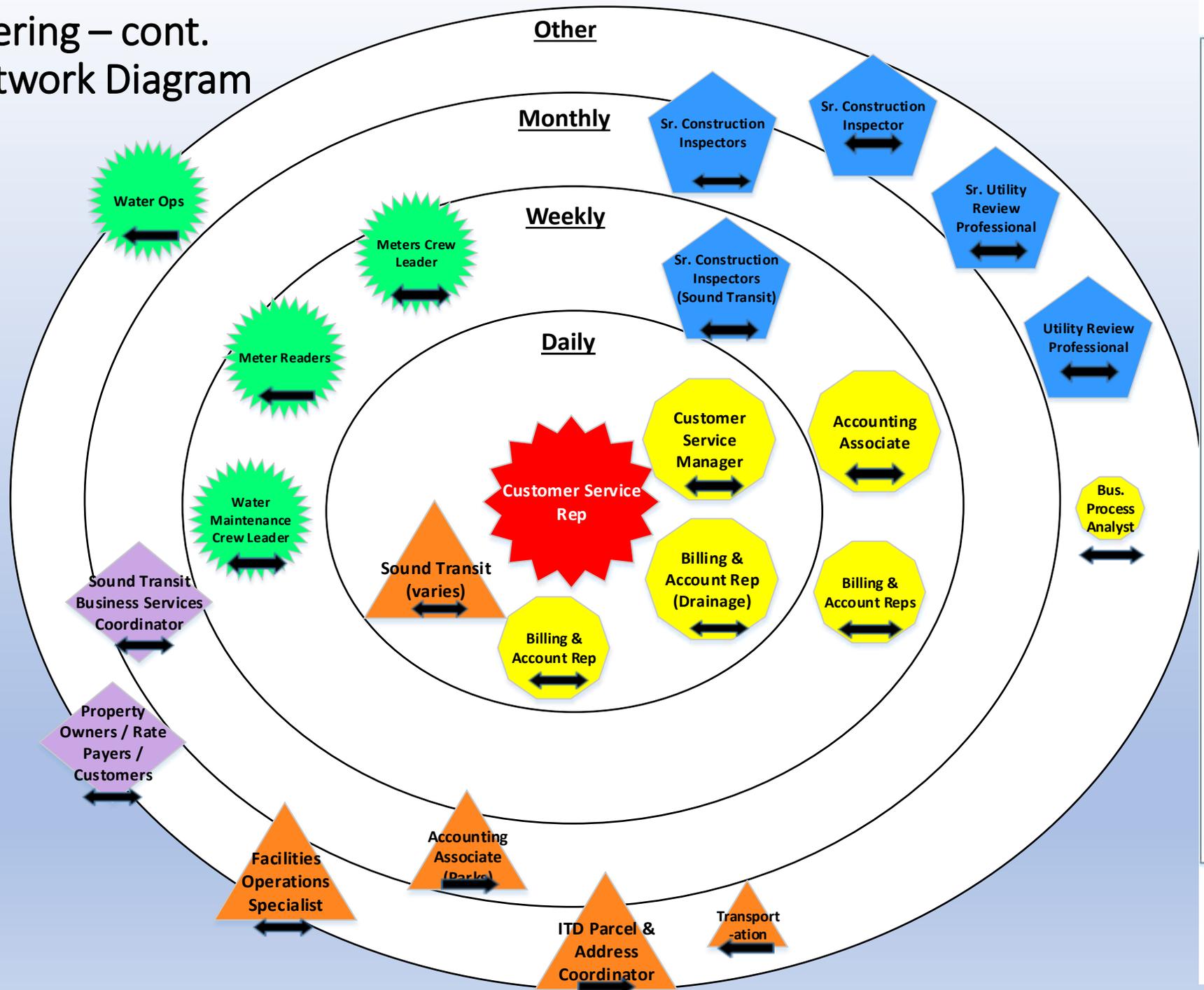
- Identify key partnerships
- Frequency of communication
- Importance of relationships
- Flow of information



# Data Gathering – cont.

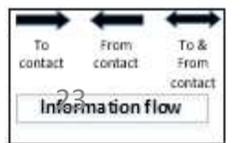
## People Network Diagram

### - example



Shape color designates organization  
Shape size designates the importance of the interactions

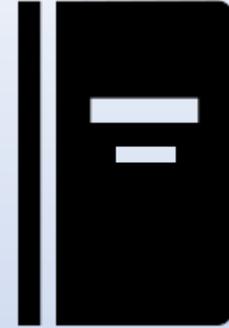
Low	Medium	High
DO	DO	DO
ENG	ENG	ENG
O&M	O&M	O&M
Other COB	Other COB	Other COB
External To COB	External To COB	External To COB
RMCS	RMCS	RMCS



# Final Deliverables

## Tool - Position Resource Guide

- Workload chart
- People network diagram
- SIPOC's
- Visual pie charts
- Org charts
- Task / position overview
- Historical / future outlook
- Success factors
- Key terms / acronyms



# Final Deliverables –cont.

## Tool - Other Documents

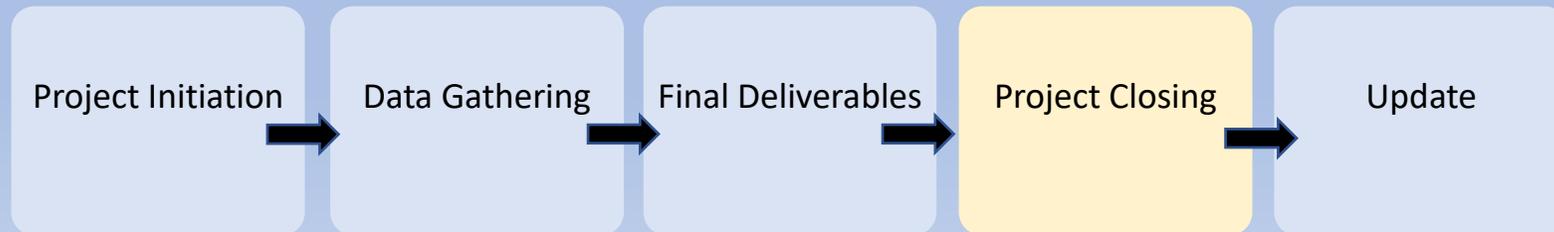
- Central document repository
- Telemetry station action plan
- Document processing improvement
- Standard operating procedures

# Project Closing

## Tool - Closing Document



- Outcome and completion timelines
- Methodology
- Final analysis
- Recommendations
- Link to the completed resource guide



# Project Closing – cont.

## Closing Document - example

### Knowledge Capture Project Close Out



**PROJECT NAME:** Knowledge Capture - Customer Service Rep Billing – Commercial & Multi-Family      **DATE:** 2/14/2018

**PROJECT MANAGER:** Shannon Wennblom      **PROJECT TEAM:** Barb Wohlwend Shannon Wennblom, Virginia Barrett

#### Knowledge Capture Resource Guide

<https://cobweb.ci.bellevue.wa.us/teams/UtilitiesEmployeeHomePage/UTOK/Completed%20Documents/RMCS%20Customer%20Service%20Rep%20Resource%20Guide%202017.docx>

#### Project Goals and Objective

Goal	Deliverable	Timeline
To capture relevant job tasks & knowledge for the position that can be assimilated into detailed position documentation and visual analysis tools to assist in leadership decision making. Documentation will be posted in a centralized location for easy access. The project will capture any potential process improvement projects that could be completed in the future.	Develop a resource guide that details tasks for commercial and multi-family accounts billing	Target completion - 5/17/17 Actual completion - 2/22/18 Variance of 205 days (3/2 completion) – project was put on hold multiple times due to competing priorities for other projects

#### Methodology

Interview based with peer / supervisor level input and validation.

#### Outcomes

- Delivered a 27-page resource guide documenting key tasks for the position.
- Identified twenty-two key contacts for the position.  
*Note: some contacts are workgroup related and may represent more than one person.*
- Process improved for deduct meter billing. Alleviated multiple steps from the process by introducing the use of Ecoply Applications which reduced the time for this task from 192 hours to 96 hours per year.
- Identified 354 hours of backlogged work annually for commercial and multi-family accounts billing work which is attributed to time spent backing up residential billing functions.

#### Final Analysis

Recommend investigating / implementing the following process improvement opportunities:

- Require photos of the meter for any reads manually submitted (primarily related to deduct meter reads, but could be applied to other areas).
- Add filters to billing reports to easily separate out commercial and multi-family accounts data alleviating the need to cherry pick through the entire report.
- City meter reactivation tasks – evaluate whether weekly cadence could be changed to a monthly cadence, eliminating the need to run reports as often.
- Time tracking at a greater level of detail would be beneficial for future workload analysis exercises.
- Review current software program for leak adjustments and determine if there is a better way to handle rate changes which would increase reliability of the information provided to billing.
- Review potential for combining City of Redmond sewer billing tasks into one cycle instead of two.
- Create a cross training plan for this position to ensure redundancy within the workgroup for Commercial and Multi-family tasks.

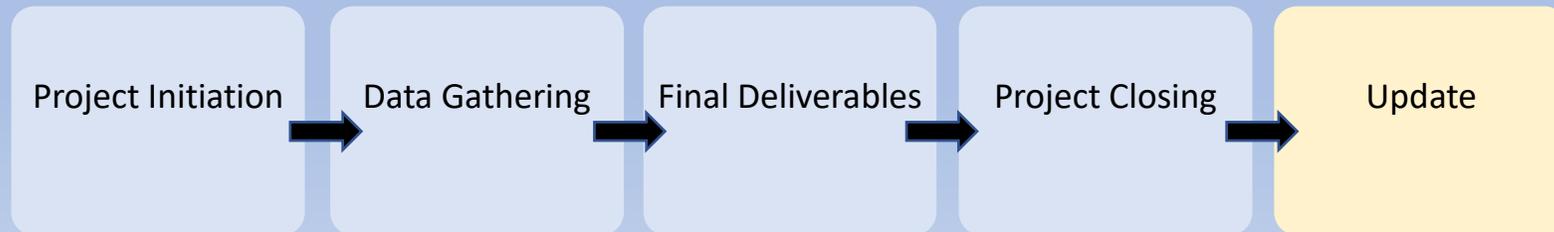
#### Next Steps

- Project closing celebration.
- Conduct annual reviews of the resource guide and track acceptance / implementation of the recommended process improvements.

# Update

## Tool – Annual Review

- Resource guide review and update – one division per quarter
- Follow up on implementation of recommendations



# Knowledge capture – Time



**Average project:**  
**Length** = 3 months

## **Time**

Facilitator / Writer - 80 – 90 hours

Subject Matter Expert – 40 hours

Supervisor – 20 hours

Peers - varies

**Resource guide** = 35 – 40 pages

# Knowledge Capture Benefits

- Protects / maintains critical knowledge within the organization
- Documents key position expectations
- Position roadmap for new employees or those considering advancement or cross training opportunities
- Surfaces potential process improvements, opportunities, and gaps

# Q&A

