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Institutional Knowledge: What Happens to Your Expertise When You Leave

Every organisation eventually loses someone whose knowledge was never written down: the specialist who knew why a client relationship worked a certain way, the consultant whose judgement calls came from twenty years of pattern recognition no manual ever captured. That loss has a name: institutional knowledge walking out the door. Two established disciplines already try to address pieces of this problem: succession planning and knowledge management, and one term gets used loosely alongside them: digital legacy. None of the three, on their own, actually solves it.

What Is Institutional Knowledge?

Institutional knowledge is the accumulated expertise, judgement, and undocumented know-how that lives inside a specific person rather than in any system or manual. It's the reason a senior consultant can walk into a client meeting and know exactly which of three plausible approaches will actually work, not because it's written anywhere, but because they've done it forty times before. When that person leaves, retires, or simply moves to a new role, that judgement leaves with them.

Where Succession Planning Falls Short

Succession planning is a genuine, well-established HR discipline, and it addresses a different question than the one at stake here. SHRM's **own research found that only 21% of HR professionals say their organisation has a formal succession plan in place at all; where plans do exist, Gallup has found that 82% of managers are chosen for their prior performance rather than any real assessment of their judgement or knowledge.**

Succession planning answers who steps into a role next. It says almost nothing about what the outgoing person actually knew: the judgement calls, the pattern recognition, the reasoning that was never written down. A named successor with the right title doesn't inherit any of that automatically.

Where Knowledge Management Falls Short, Too

Knowledge management is the other established category enterprises reach for, but it was largely built to organise documented processes, FAQs, and reference material inside software systems, not to capture what a specific senior expert privately knows before they retire or move on. A knowledge management platform can hold a policy document. It can't hold the reasoning a twenty-year specialist uses to decide when to break that policy.

Not the Same as a "Digital Legacy", Either

"Digital legacy" gets used in a related-sounding but different context: it typically refers to what happens to someone's online accounts, files, and digital footprint after they die, the subject of Apple's own Digital Legacy programme and most estate-planning guidance. That's a real and useful concept. It's also not this. The knowledge risk explored here has nothing to do with someone's passing, it's about what an organisation stands to lose the day a specialist hands in their notice, which happens far more often and far sooner.

The Real Gap: Capturing Institutional Knowledge Before It Walks Out the Door

Analysis from Bloor Research has flagged a version of this at enterprise scale: as much as 40 years of specialist knowledge can sit locked inside a single expert's head, with no structure in place to capture or transfer it before that person leaves. **Separately, Bloomfire's own research into workplace knowledge-sharing found that 98.5% of employees say better knowledge sharing across their organisation would improve their own productivity, a strong signal that the demand to fix this is already there, even where the tooling to do it isn't.**

Three things actually work to close this gap:

1. **Codify the reasoning, not just the output.** Capture why a decision was made, not only what was decided.
2. **Structure it for reuse, not just storage.** A document sitting in a folder isn't captured knowledge; a resource that gets consulted and applied is.
3. **Build it before the departure is announced.** Waiting for a resignation letter leaves weeks, not years, to capture decades.

Where DigitalMe Fits

Bloor Research's framework for this is what it calls **Your Knowledge Base**: one part of DigitalMe, its structured, owned representation of a person's knowledge, judgement, and intellectual identity: everything a specialist knows: methodologies, models, opinions, and the experience behind them, codified in a form the organisation can keep, independent of whether that person is still in the room.

Frequently Asked Questions (FAQs)

1. **Is institutional knowledge the same as succession planning?**
   No. Succession planning decides who takes over a role. It doesn't capture what the departing person actually knew, the judgement and reasoning behind their decisions.
2. **Is this the same as a digital legacy?**
   No. A digital legacy typically refers to someone's online accounts and data after they die. This is about capturing a specialist's working knowledge while they're still very much employed, usually well before any departure is even being discussed.
3. **Isn't this what knowledge management software already does?**
   Not quite. Most knowledge management platforms organise documented processes and reference material. They weren't built to capture the undocumented judgement a senior expert carries but has never written down.
4. **What actually captures this kind of knowledge?**
   A structured approach built specifically for it, codifying not just what an expert decided, but why, in a form the organisation owns and can keep using after that person moves on. Bloor Research's version of this is Your Knowledge Base, part of its DigitalMe framework.

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