

PRACTICAL SOLUTIONS FOR KNOWLEDGE MANAGEMENT, RETENTION, TRANSFER, AND SUCCESSION PLANNING FOR THE OIL & GAS INDUSTRY

October 14, 2014
Marriott West Loop
Houston, TX



EUCI is authorized by IACET
to offer 0.7 CEUs for the
conference.

OVERVIEW

A large segment of the industry's workforce is nearing retirement age over the next five to ten years. These employees have acquired a tremendous amount of knowledge about how things work, how to get things done, and who to go to when problems arise. If the knowledge and skills are not transferred, their benefit may be lost, exiting with the retiring workforce. The retention of knowledge and skills is of vital importance as the remaining employees may not possess the same level of experience. Losing long-time employees' expertise can significantly reduce efficiency, giving rise to costly mistakes, unexpected quality problems, or significant disruptions in services and/or performance. This can result in a serious knowledge deficit which might be permanent.

This one-day conference will review techniques for knowledge retention and transfer. Expert speakers will discuss how to establish an effective knowledge management program. Attendees will learn how to assess the documenting process for the knowledge management, retention, and succession planning. Attendees will leave with the ability to evaluate practical strategies for succession planning. They will learn to analyze monitoring systems for knowledge management and retention as well as succession planning. Speakers with years of oil and gas industry experience will address possible barriers to knowledge management, retention, transfer, and succession planning. The conference will conclude with a panel discussion of additional questions and hot topics.

WHO SHOULD ATTEND

- Oil and gas company executives
- Federal, state and local employment agencies
- Oil and gas company managers
- Oil and gas company human resource managers
- Oil and gas service company managers
- Placement /staffing companies
- Recruiters for oil and gas industry
- Educational institutions of higher learning - Faculty
- Educational institutions of higher learning - Career placement

LEARNING OUTCOMES

- Discuss how to establish an effective knowledge management program
- Describe techniques for knowledge retention and transfer
- Assess the documenting process required for the knowledge management, retention, and succession planning processes
- Evaluate practical strategies for succession planning
- Analyze monitoring systems for knowledge management, retention, and succession planning
- Address possible barriers to the knowledge management, retention, transfer and succession planning processes
- Discuss additional questions and hot topics within talent management, retention, transfer, and succession planning in the oil & gas industry

AGENDA

Tuesday, October 14, 2014

7:30 – 8:00 a.m.

Registration and Continental Breakfast

8:00 – 9:00 a.m.

Establishing an Effective Knowledge Management Program

Effective knowledge management programs will be crucial as the oil & gas industry prepares for significant workforce changes over the next 5-10 years. Knowledge management is the process of capturing, developing, sharing, and effectively using organizational knowledge. It is a multi-disciplined approach to achieving organizational objectives by making the best use of knowledge. This session will cover:

- Determining What Information Should be Included in the Knowledge Management Program
- Deciding how to Share, Organize & Manage the Knowledge Required for a Management Program
- Establishing a System to Monitor the Efficacy of the Knowledge Management Program
- Possible Barriers to Establishing an Effective Knowledge Management Program

- *Chip Smith, Director, Human Resources, Scientific Drilling*

9:00 – 10:00 a.m.

Techniques for Knowledge Transfer: Establishing a Knowledge Transfer Process

Knowledge transfer is the methodical replication of the expertise, wisdom, and tacit knowledge of critical professionals into the heads and hands of their co-workers. It is more than just on-the-job training. It is the planned movement of the right skills and information at the right time to keep a workforce prepared, productive, innovative, and competitive. This session will address:

- The Importance of Establishing a Knowledge Transfer Process
- How to Determine What Knowledge Should be Transferred, Why and to Whom
- Determining the Appropriate Tools to be Utilized for Knowledge Transfer
- Establishing the Documenting Process Required for a Knowledge Transfer Process
- How to Determine the Type of Knowledge to be Transferred (Explicit, Implicit, or Tacit)

- *Adrienne Captain, Learning and Organizational Development Consultant, Noble Drilling*

10:00 – 10:30 a.m.

Networking Break

10:30 a.m. – 12:00 p.m.

Techniques for the Knowledge Transfer: Best Practices for Knowledge Transfer Training and Efficacy

This session will continue the discussion regarding techniques for the knowledge transfer process by discussing ways to:

- Identify and Establish the Best Practices System for Knowledge Transfer
- Explain the Types of Training Required for the Knowledge Retention and Transfer
- Establish a System to Monitor the Knowledge Retention and Transfer Process
- Possible Barriers to the Knowledge Transfer Process

- *Adrienne Captain, Learning and Organizational Development Consultant, Noble Drilling*

12:00 – 1:00 p.m.

Group Luncheon

1:00 – 2:00 p.m.

Keeping Knowledge In-House: Techniques for the Knowledge Retention Process

Knowledge retention is crucial for long-term organizational success. It involves capturing knowledge in the organization so that it can be used later. Knowledge retention is often discussed in the context of losing key employees and using techniques such as exit interviews to try to capture their knowledge. In reality, knowledge retention should be integrated into how the organization operates well before a key employee is about to depart. This session will discuss:

- The Importance of a Knowledge Program and How it Differs from the Knowledge Transfer Process
- Establishing Knowledge Recovery Initiatives Process
- How to Use IT to Capture, Store & Share the Knowledge for the Retention Process
- The Use of Human Resources Processes and Practices for Knowledge Retention
- How to Implement a Mentoring Program for Knowledge Retention
- Possible Barriers to the Knowledge Retention Process

- *Veronique Tinsley, Director, HR Technology, Anadarko Petroleum Corporation*

AGENDA

Tuesday, October 14, 2014 (CONTINUED)

2:00 – 3:00 p.m.

Practical Strategies for Succession Planning

Succession planning is a process for identifying and developing internal people with the potential to fill key business leadership positions in the company. Succession planning increases the availability of experienced and capable employees that are prepared to assume these roles as they become available. This session will discuss:

- The Importance of Succession Planning and Its Relationship to Knowledge Management, Retention and Transfer
- How to Perform the Capacity and Needs Assessment for the Succession Planning Process
- How to Develop and Implement the Most Effective Succession Plan for Your Organization
- Identification of Best Practices for Succession Planning
- Monitoring and Managing the Succession Plan
- Possible Barriers to the Succession Planning Process

- *Adrienne Captain, Learning and Organizational Development Consultant, Noble Drilling*

3:00 – 3:15 p.m.

Afternoon Break

3:15 – 4:00 p.m.

Global Considerations: Potential Obstacles Regarding Knowledge Management, Retention, Transfer, and Succession Planning Processes in the International Arena

Oil & gas companies all over the world are faced with the need to manage, retain and transfer knowledge in an international arena. This session will address:

- The Importance of Establishing a Secure Method of Transmission by which the Processes of Knowledge Management, Retention, Transfer, and Succession Planning May be Carefully Conducted in the International Environment
- How to Choose the Appropriate Knowledge and Knowledge Process for the International Arena
- Identification of International Factors Which Might Affect the Succession Planning Process
- Security of Knowledge in the International Arena
- Discussion of International Regulations Governing Knowledge Management, Transfer, and Retention

- *Elizabeth Young-Krueger, JD., Global Division HR Director, Vallourec Drilling Products*

4:00 – 5:00 p.m.

Question and Answer Panel

This interactive session will give attendees the opportunity to ask a panel of experts about any questions about attracting, hiring, developing, and retaining new talent.

Moderator: *Deniese Palmer-Huggins, Financial Consultant & Risk Manager/Energy Transfer Partners, Center for Energy Economics, University of Texas*

Panelists:

- *Adrienne Captain, Learning and Organizational Development Consultant, Noble Drilling*

- *Chip Smith, Director, Human Resources, Scientific Drilling*

- *Veronique Tinsley, Director, HR Technology, Anadarko Petroleum Corporation*

- *Elizabeth Young-Krueger, Global Division HR Director, Vallourec Drilling Products*

SPEAKERS



Adrienne Captain / Global Instructional Developer- Learning and Organizational Development Consultant / Noble Corporation

Adrienne Captain is a learning and organization development consultant in the oil and gas industry. Her experience spans across multiple industries in the areas of industrial-organizational psychology, organizational development, training, instructional design, succession planning, and change management for more than 14 years. She provides expertise to clients and organizations on all areas of the ADDIE model, learning management systems, organizational communications, policy interpretation, development, and knowledge transfer.

She is currently consulting on a drilling superintendent project at Noble Drilling Services, Inc. The project involves collaborating with managers throughout the organization to collect, extract, and analyze knowledge, skills, and abilities (KSAs) to improve overall performance and make recommendations for training and individual development planning at that level.

In addition to her corporate experience, Adrienne has been an adjunct and full college professor instructing psychology, sociology, cultural diversity, business management and leadership for 10 years of her career. She has two undergraduate degrees (Psychology and Sociology) from Grambling State University and a graduate degree (Industrial and Organizational Psychology) from Louisiana Tech University.



Deniese Palmer-Huggins / Financial Consultant & Risk Manager / Energy Transfer Partners, Center for Energy Economics, University of Texas

Deniese Palmer-Huggins is a financial consultant and risk manager, previous vice president of finance at Sun Coast Resources and former director at the New York Mercantile Exchange.

She began her career financing international and domestic energy transactions at Banque Paribas, Houston (now BNP Paribas). In 1983, she joined the finance department of Transworld Oil, an international and domestic energy trading company. In 1985, she participated in Transworld's transition team when it purchased Arco's refining and marketing assets in Philadelphia and formed Atlantic Refining and Marketing. In 1986, she was promoted to treasurer of Transworld (USA) Inc.

In 1992, she joined Bayoil (USA) as its treasurer and manager of its offshore company, Bayoil SA, a crude oil marketing firm which sourced crude oil and refined products in the Black Sea, Middle East, Eastern Europe, and the U.S. She was promoted to treasurer in 1987.

In 1997, she joined the New York Mercantile Exchange to head up its Houston office as director of the commodity exchange where she was responsible for marketing the exchange and energy derivatives. In 2002, she joined Prudential Financial Derivatives, LLC to head up its Houston office and help it expand its energy derivative trading and clearing business. In 2005, she joined Sun Coast Resources as its vice president of finance as part of its growth strategy. In her capacity as VP of finance, she also implemented a hedging program for the company.



Chip Smith / Director of Human Resources / Scientific Drilling International, Inc.

Chip Smith is an accomplished Human Resources Director leading domestic and global initiatives to ensure people reach their highest potential to understand and exceed corporate goals. Chip is passionate about organizational development, relationship building and clear communication to strengthen employee value proposition, deepen employee engagement and build corporate culture.

Chip also has proven success in organizational development, leadership influence, and innovative strategic solutions to solve complex problems. His extensive background includes strategic and tactical comprehensive generalist skills in recruitment, employment, employee relations, compliance, compensation & benefits, (including stock and ownership issues). Chip also has experience in policy development, performance evaluation, organizational development, employment law and HRIS in both global and domestic environments.



Elizabeth Young-Krueger / Global Division HR Director, Vallourec Drilling Products

Elizabeth is the Drilling Division HR Director for a Global Division of Vallourec Group, a 22,000 multi-national organization based in Paris, France. The drilling division has manufacturing sites located in France, USA, UAE and Brazil.

Elizabeth aligns, designs and implements HR initiatives to support the business goals and objectives. She designed and deployed a matrix based sales organization that aligns both regional and global sales goals. Elizabeth routinely creates global talent management reviews complete with succession plans, training plans and development opportunities for employees to the senior corporate management team. Elizabeth has led reorganization effort in research and development departments to better focus the organization on customer needs.

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INSTRUCTIONAL METHODS

Case studies, PowerPoint presentations and group discussion will be used in this event.

REQUIREMENTS FOR SUCCESSFUL COMPLETION OF PROGRAM

Participants must sign in/out for the day and be in attendance for the entirety of the conference to be eligible for continuing education credit.

IACET CREDITS



EUCI has been accredited as an Authorized Provider by the International Association for Continuing Education and Training (IACET). In obtaining this accreditation, EUCI has demonstrated that it complies with the ANSI/IACET Standard which is recognized internationally as a standard of good practice. As a result of their Authorized Provider status, EUCI is authorized to offer IACET CEUs for its programs that qualify under the ANSI/IACET Standard.

EUCI is authorized by IACET to offer 0.7 CEUs for the conference.

EVENT LOCATION

A room block has been reserved at the Marriott West Loop, 1750 West Loop South, Houston, TX 77027, for the nights of October 12-13, 2014. Room rates are \$179, plus applicable tax. Call 713-960-0111 for reservations and mention the EUCI program to get the group rate. The cutoff date to receive the group rate is September 12, 2014, but as there are a limited number of rooms available at this rate, the room block may close sooner. **Please make your reservations early.**

PROCEEDINGS

The proceedings of the event will be published, and one copy will be distributed to each registrant at the event.

[Click Here to Register Online](#)

FIVE EASY WAYS TO REGISTER

One: CALL
(201) 871-0474

Two: FAX
(253) 663-7224

Three: E-MAIL
register@pmaconference.com

Four: MAIL
PMA
P.O. Box 2303
Falls Church, VA 22042

Five: WEB SITE
www.pmaconference.com

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PLEASE REGISTER THE FOLLOWING

- DISCOUNT FOR ATTENDING BOTH **PRACTICAL SOLUTIONS FOR ATTRACTING, HIRING, DEVELOPING, AND RETAINING TALENT IN THE OIL & GAS INDUSTRY**, OCTOBER 13, 2014 AND **PRACTICAL SOLUTIONS FOR KNOWLEDGE MANAGEMENT, RETENTION, TRANSFER, AND SUCCESSION PLANNING FOR THE OIL & GAS INDUSTRY**, OCTOBER 14, 2014: US \$1895
EARLY BIRD ON OR BEFORE OCTOBER 3, 2014: US \$1695

- PRACTICAL SOLUTIONS FOR KNOWLEDGE MANAGEMENT, RETENTION, TRANSFER, AND SUCCESSION PLANNING FOR THE OIL & GAS INDUSTRY** CONFERENCE ONLY
OCTOBER 14, 2014: US \$995
EARLY BIRD ON OR BEFORE OCTOBER 3, 2014: US \$895

[Click Here to Register Online](#)

How did you hear about this event? (direct e-mail, colleague, speaker(s), etc.)

Print Name

Job Title

Company

What name do you prefer on your name badge?

Address

City

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List any dietary or accessibility needs here

CREDIT CARD

Name on Card

Account Number

Billing Address

Billing City

Billing State

Billing Zip Code/Postal Code

Exp. Date

Security Code (last 3 digits on the back of Visa and MC or 4 digits on front of AmEx)

OR Enclosed is a check for \$ _____ to cover _____ registrations.

CANCELLATION POLICY

All cancellations received on or before September 12, 2014, will be subject to a US \$195 processing fee. Written cancellations received after this date will create a credit of the tuition (less processing fee) good toward any other EUCI event or publication. This credit will be good for six months. In case of event cancellation, EUCI's liability is limited to refund of the event registration fee only. For more information regarding administrative policies, such as complaints and refunds, please contact our offices at (201) 871-0474.