

Small But Mighty Agency Podcast

Episode 94: How to transfer niche knowledge to your team so you can scale

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Audrey Joy Kwan

Have you struggled with letting go of client work and trusting your team to deliver?

You might feel – even with processes – that your team can't deliver at the level you want.

It's not unusual for agency owners to struggle with sharing their specialized knowledge with their team.

The struggle is made more difficult when you don't know or don't solve the root of the challenge. This misunderstanding leads to reliance on ineffective, "quick-fix" solutions.

I often hear agency owners express the challenge as "my team let me down" or "I find it hard to delegate client responsibilities," but the root is the struggle to transfer your niche knowledge.

In this episode, I explore the challenge of niche knowledge transfer and provide three key strategies for knowledge transfer in your agency.

Tune in.

Audrey Joy Kwan

Welcome to the Small But Mighty Agency Podcast. If you're a marketer or consultant, or a creative on a journey of growth from solopreneur to agency owner, follow along because I pull back the curtains on the realities of growing and running a scalable, service-based business and building lean team. I'm your host, Audrey Joy Kwan, I know what it takes to build an agency, whether it's from solo to three, five or twenty. I've done it, including supporting an agency owner to sell and exit. I've coached and consulted over 120 marketers, creatives, and consultants. And I've been behind the scenes of seven figure businesses. I also have a master's degree in communications specializing in organizational development. All this to say, I know what it takes to grow lead and

operate a multiple six, and seven figure small but mighty agency. And here on this podcast is where we'll dive right in.

Audrey Joy Kwan

Hey friends,

Welcome back.

Spring is in full swing here. I just came in from a walk, and we have these beautiful cherry blossom trees in our neighbourhood, and the buds are coming out. When these trees are in full bloom, I feel transported to somewhere magical; it's so beautiful, even though I walk the same block every morning.

So, in this Spring series, we're exploring niche agencies. If you haven't listened to the first two episodes, get the link in the show notes to hear which niches have the most opportunities for agencies right now and how successful niche agencies are thinking and doing differently in the current economy.

Today, the heart of our conversation is how to transfer niche knowledge to your team so that you can let go of client work and trust your team to deliver.

To be fair, I haven't had a client say to me I struggle with transferring my niche knowledge; that's why I'm stuck at capacity and feel like I can't scale my business with a team.

Instead, how my clients typically phrase the challenge before they start working with me sounds something like this:

They might say:

- "I have the processes I want my team to follow, but they're not able to deliver at the level I want it to be."

OR it might sound something like this:

- My team "lets me down," and I feel like I need to get back to working in my business instead of on it so I don't lose clients.

OR it's expressed as:

- I don't know how to trust my team.
- AND I struggle with letting go of client work and clients' expectations that I will be involved in most projects.

Even though agency owners I work with don't express the challenge using the words niche knowledge transfer – the source of the challenge is exactly that. In other words, it's being able to transfer niche knowledge to your team so that the team can deliver on the expectations.

What does niche knowledge transfer mean?

When you're industry-niched, you gain in-depth knowledge from working closely with a specific industry. All that knowledge and experience is trapped in you, making it feel hard to transfer.

The same principle goes for a service niche; you have a select way of doing things that might feel hard to transfer to your team.

What further gets in the way of niche knowledge transfer happening is getting distracted by the wrong thing, typically, the wrong thing is made shiny by the magic pill trap.

The magic pill trap is enticing because it's a solution based on truth but part truth. While it does solve a problem, for many challenges, buying the magic pill is like a duct tape approach to stopping a leaky pipe.

The magic pill trap leads you to think that if you do this tactical thing that everybody else is doing to grow their business, it should naturally grow yours, too.

For example, you might hire a position that worked for somebody else's business and think if it worked for them, it'll work for you without strategically considering your end-game.

One of the most common examples is hearing agency owners hire online business managers because non-agency owners running completely different business models suggest it.

The shiny world of marketing sells quick fixes, but quick fixes are how we end up duped and feeling defeated. That is not what I want for you.

A quick fix tactic is like using duct tape to patch a leaking pipe; it might temporarily stop the leak, but it doesn't solve the underlying problem, and eventually, the leak will burst, causing more damage.

You need to find the source of the leak to stop it, but it's not always in the most obvious places, and that's where expertise saves you time and money.

When I hear agency owners say they have a hard time letting go of client work, I know it's a function of several things. While they might think they have what they need, the sequence might be incorrect, or a pivotal consideration might have been missed, making the puzzle pieces unfit.

One primary source of the pain and a pivotal thing we unpack for our clients is how to transfer niche knowledge.

Strategically, we make niche knowledge transfer part of your business structure and streamline it so you can build a team you trust to serve your niche and get out of client delivery.

Niche knowledge transfer is a strategic system in your business.

Here are three foundations for transferring niche knowledge to your team so you can get out of client delivery and have a team that delivers to your expectations.

Identify Key Knowledge Areas

When it comes to niche knowledge, your common sense is not everybody else's common sense, so we need to capture all the key knowledge areas.

Capturing key knowledge involves categorizing the information into manageable segments or topics before identifying the right systems to transfer the knowledge and keep it fresh.

Examples of knowledge areas can be the history of the niche, proven strategies, disproven strategies, communication expectations of the niche, industry giants or influencers that lead innovation, and the list can go on.

By getting clear on the key knowledge areas we can figure out what strategic systems to put into place so that the niche knowledge is transferred, maintained and grows.

Make Niche Knowledge Learning Part of Your Culture

In a fast-paced environment where capacity might already be challenging, you want your new hires to jump right in and get going.

The pro of having a niche is your depth of knowledge, which lends itself well to focus. However, new employees and contractors have a steeper learning curve unless they come from the same niche.

Your niche knowledge is intellectual Property, and with the knowledge is a learning curve.

Time is money, but it is well spent when you invest some of it in making niche learning part of your culture.

I have a client who is an events agency. She has a niche in working with universities.

In the past, when she hired her event account managers, she would jump into assigning work quickly. This was understandable because they had clients that needed to be served, but ultimately, this created “reactive” vs. “proactive” teams.

In other words, they were being trained to react to requests instead of proactively owning the results.

Making niche knowledge learning part of your culture can save you time by giving your team what they need to be proactive; it did for my client.

We added strategic niche learning to her team onboarding process and carved out time—not a long time but a focused time—to understand the niche while clarifying the purpose and expectations.

The result is that team members are set up for greater success and given the opportunity to contribute at higher levels because they have the right strategic support.

This leads to our last point:

Create Strategic Systems for Niche Knowledge

A strategic system consists of the processes and information systems that guide strategic decision-making and achieving long-term goals.

Let's highlight strategic systems with a concrete example from marketing agencies.

I work with several marketing agencies in different specialties. As a niche marketing agency, the advantage is knowing what works and what doesn't work for marketing strategies and promotions and then using the knowledge to get results faster for clients. It's like a shortcut because you don't have to test new things every time, you have reliable plays, and you refine the plays.

However, when you bring in a new account manager to a niche agency, you have to transfer niche strategy knowledge so that the accounts person can better serve the clients.

If you don't have a strategic system, you transfer niche knowledge primarily by having hires shadow and ask their peers, managers or you-the-boss questions. Sometimes, the new hire feels like they are bothering people, so they don't ask, or sometimes they ask and get different answers, so they don't know which is true. Either way, it impacts productivity and bandwidth.

If that's sounds familiar, let's see how an example of a strategic system solves that challenge.

Strategic systems don't need to be complicated; they should be easy to use and smart. In a marketing agency where you need to transfer niche strategy knowledge quickly and ensure that learnings don't get lost, a strategy dashboard is an easy-to-use and smart system that I recommend.

The strategy dashboard captures what works and why, as well as what doesn't work and why. The purpose is to increase your team's effectiveness. It eliminates playing telephone or back and forths. The dashboard is your internal database, and the ownership of the internal database can be passed forward.

That's just one example of a strategic system for addressing the root of the challenge, which is transferring niche knowledge.

Again, when you start by identifying your key niche knowledge areas it clarifies how to make knowledge transfer part of your learning culture and what strategic systems you need.

Going back to our analogy, a quick-fix tactic is like using duct tape to patch a leaking pipe; it doesn't solve the underlying problem and can cause more damage if you don't know the source of the leak.

Finding and solving for the source saves you time and money. So, if you feel like you can't let go of the client work to your team, it's time to solve the source of the challenge instead of using duct tape.

Whether you have a niche or not, I hope this episode will help you understand the importance of knowledge transfer and empower you to grow a business that scales more easily.

If you want to connect on what is and isn't working for your agency, I'm here for it. Let's help you grow a business that doesn't have you stuck in the day-to-day. You know where to find me; click on the show notes.

Thanks for joining me, friends; I'll see you at the next one.

Audrey Joy Kwan

Hey, there. Thanks for hanging out with me at the Small But Mighty Agency Podcast. If you enjoyed this episode, it would mean the world to me if you hit the follow or subscribe button in your podcast app and share it with a friend and I'll see you in the next one.