



Organizational Memory Preservation During Workforce Turnover

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Abstract

Workforce turnover creates an organizational challenge that extends beyond the replacement of departing employees. Employees accumulate procedural understanding, problem-solving routines, customer histories, relational networks, technical judgment, contextual knowledge, and lessons from previous successes and failures. When such knowledge remains concentrated in individuals, employee departure can weaken organizational memory even when formal documents and information systems remain intact. This study develops an Organizational Memory Preservation System (OMPS) for reducing knowledge discontinuity during workforce turnover. The framework integrates critical-knowledge identification, tacit knowledge transfer, explicit knowledge capture, successor readiness, knowledge retrievability, and post-exit reintegration. Because no real employee-turnover or knowledge-management dataset was supplied, the study adopts a transparent simulation-based explanatory design. Five synthetic organizational conditions representing memory-preservation maturity levels from 20% to 100% were evaluated. The simulated results indicate that preservation of critical knowledge after turnover increases from 43% under fragmented memory practices to 89% under a mature preservation system.

At the same time, undocumented process loss declines from 38% to 9%, median successor stabilization time decreases from 24 to 6 working days, and repeated knowledge-related errors decline from 29% to 8%. The study argues that organizational memory cannot be preserved by documentation alone because important knowledge is embedded in people, relationships, routines, tools, and situated work practices. Effective preservation therefore requires a combination of codification and person-to-person transfer supported by explicit ownership and retrieval mechanisms. The framework contributes to organizational-memory and knowledge-retention literature by positioning turnover management as a systematic memory-continuity process rather than a short exit-administration activity. The simulated findings are theoretical scenario outcomes and should not be interpreted as empirical estimates of actual organizations.

Keywords: organizational memory, workforce turnover, knowledge retention, knowledge loss, tacit knowledge, knowledge transfer, succession, knowledge continuity

1. Introduction

Workforce turnover is generally discussed in relation to recruitment expenditure, vacancy disruption, employee replacement, and retention strategy, yet the departure of an experienced organizational



member can produce a less visible consequence: the loss of knowledge that supported everyday organizational functioning. Organizational memory concerns information and interpretations from an organization's history that can influence current decisions. Walsh and Ungson's seminal formulation emphasized that organizational information can be retained through individuals, organizational culture, transformations, structures, ecology, and external archives, indicating that memory is dispersed rather than stored exclusively within formal documents.

The risk created by employee departure becomes particularly important because organizational knowledge is not uniformly codifiable. Nonaka's theory of organizational knowledge creation distinguished the dynamic interaction between tacit and explicit knowledge, while Argote and Ingram emphasized that knowledge can be embedded in relationships among organizational members, tasks, and tools. An experienced employee may therefore possess knowledge that is difficult to represent completely in a procedure manual, including exception handling, diagnostic intuition, informal stakeholder relationships, sequencing judgment, and accumulated understanding of why particular routines exist.

Knowledge loss can consequently occur even when an organization retains databases, files, policies, and technical documentation. Levy's knowledge-retention framework emphasizes defining the knowledge-retention scope, documenting relevant knowledge, and integrating retained knowledge back into organizational use, while Martins and Meyer identify organizational and behavioral factors that shape retention, particularly for tacit knowledge. Research on older and retiring employees likewise demonstrates that successful preservation depends on knowledge characteristics, individual willingness and capability, relationships between knowledge holders and recipients, and the organizational environment in which transfer occurs.

The present paper develops the concept of an Organizational Memory Preservation System to connect these previously distributed mechanisms. It treats turnover not simply as the moment when an employee leaves but as a potential interruption in an organizational memory chain. The proposed approach therefore begins before departure by identifying knowledge vulnerability, continues through structured transfer and capture, and extends beyond the employee's final working day through retrieval, application, validation, and successor learning. Because no empirical workforce dataset was supplied, the numerical evaluation is explicitly simulation based. The purpose is to establish a theoretically grounded and empirically testable model for understanding how organizational memory-preservation maturity could influence knowledge continuity during workforce turnover.

2. Objectives of the Study

2.1 To Conceptualize Organizational Memory Preservation During Employee Turnover

The first objective is to distinguish organizational memory preservation from conventional employee offboarding. Traditional exit administration usually concentrates on formal activities such as return of assets, administrative clearance, final compensation, access termination, and role handover. These processes are operationally necessary but do not guarantee that strategically significant knowledge has been identified or transferred. Walsh and Ungson's framework indicates that organizational memory is located across multiple organizational repositories, making a narrow document-transfer approach theoretically incomplete.



The study therefore conceptualizes preservation as a continuity process through which knowledge at risk of departure is identified, prioritized, transferred, codified where appropriate, connected with responsible successors, and made retrievable for subsequent use. This broader interpretation recognizes that organizational memory has both informational and social components and that a successful handover requires more than creating files that future employees may never locate or understand.

2.2 To Develop an Organizational Memory Preservation Maturity Framework

The second objective is to develop a structured maturity framework capable of distinguishing fragmented knowledge-retention activity from systematic organizational memory management. The proposed model incorporates six dimensions: critical-knowledge identification, tacit knowledge transfer, explicit knowledge capture, successor readiness, knowledge retrievability, and organizational reintegration.

These dimensions reflect established knowledge-management theory. Argote, McEvily, and Reagans organize knowledge management around creation, retention, and transfer, while Levy emphasizes that retained knowledge must ultimately be reintegrated into organizational activity rather than remaining as inactive documentation. The maturity framework therefore evaluates both preservation activity and subsequent usability.

2.3 To Examine Simulated Knowledge-Continuity Outcomes

The third objective is to examine how progressively stronger memory-preservation practices could theoretically affect turnover-related knowledge continuity. The analysis considers the proportion of critical knowledge preserved, undocumented process loss, successor stabilization time, repeated knowledge-related problems, and confidence that retained information can be retrieved when required.

The study does not use significance tests because the analytical scenarios are synthetic. Instead, descriptive comparative analysis is used to make the proposed relationships transparent. This distinction is methodologically important because Massingham's longitudinal work demonstrates that knowledge loss can have organizational consequences but also illustrates the complexity involved in measuring the value and effects of lost knowledge in real organizational settings.

3. Review of Literature

3.1 Organizational Memory and the Location of Knowledge

Walsh and Ungson provided one of the most influential conceptualizations of organizational memory by arguing that information derived from organizational history can be stored across individuals, organizational culture, transformations, structures, physical arrangements, and external archives. Their framework established that organizational remembering is fundamentally distributed. When employees leave, the vulnerability of organizational memory therefore depends partly on how strongly essential knowledge remains concentrated in individual members rather than replicated across other organizational repositories.

Stein subsequently reviewed organizational-memory concepts across information systems, management science, economics, organizational behavior, communication, and related disciplines. His analysis reinforced the managerial importance of understanding how organizational knowledge is

acquired, retained, maintained, searched, and retrieved. Stein and Zwass further examined the role of information systems in actualizing organizational memory, showing why technology can support preservation but should be understood as part of a broader organizational memory system.

The distinction between knowledge storage and knowledge use is particularly important during turnover. An organization may possess thousands of files yet still experience memory loss when employees cannot locate the relevant material, do not understand its context, or cannot reconstruct the judgment through which it was originally applied. The present study therefore uses retrievability and reintegration as separate memory-preservation dimensions rather than assuming that stored information automatically constitutes usable organizational knowledge.

3.2 Tacit Knowledge, Transfer, and Knowledge Retention

Nonaka's organizational knowledge theory emphasizes interactions between tacit and explicit forms of knowledge. Tacit knowledge includes experiential and context-dependent understanding that may be difficult to articulate fully, whereas explicit knowledge is more amenable to formal representation. This distinction has direct implications for workforce turnover: structured documents are well suited to preserving some forms of knowledge, but observation, mentoring, demonstration, storytelling, guided practice, and repeated interaction may be necessary when expertise is strongly experiential.

Argote and Ingram define knowledge transfer in terms of one organizational unit being affected by the experience of another and emphasize knowledge embedded in people, tools, and tasks. Argote, McEvily, and Reagans subsequently developed an integrative perspective connecting knowledge creation, retention, and transfer with organizational context. These contributions imply that preserving knowledge from a departing employee requires attention not only to what the employee knows but also to the relationships, routines, technical systems, and work arrangements through which that knowledge becomes productive.

Levy's knowledge-retention research proposes a structured process incorporating scope definition, documentation, and organizational integration. Martins and Meyer likewise emphasize that knowledge retention depends upon both organizational and behavioral conditions, particularly where tacit knowledge is concerned. The combined implication is that retention cannot be delegated solely to information-technology systems or human-resource exit forms; it requires a coordinated managerial process.

3.3 Turnover, Knowledge Loss, and Continuity Risk

Knowledge-retention concerns become especially visible when experienced workers retire or otherwise exit. Calo's work on the aging workforce emphasizes the risk that valuable employee knowledge can disappear when experienced workers leave before effective transfer takes place. Burmeister and Deller's review similarly identifies knowledge retention from older and retiring workers as an important organizational issue and organizes previous research around characteristics of knowledge, individuals, relationships, and organizational context.

DeLong and Davenport argue that changing workforce demographics can expose organizations to substantial knowledge-retention challenges and advocate multifaceted approaches rather than a single knowledge-capture intervention. Beazley, Boenisch, and Harden similarly conceptualize continuity



management around preserving knowledge and productivity when employees depart. These approaches are important because turnover risk differs by role: departure from a highly standardized position does not necessarily create the same memory exposure as departure from a role containing unique expertise, long-standing external relationships, or undocumented decision routines.

Later research further demonstrates the importance of distinguishing among different types of knowledge and retention mechanisms. Levallet and Chan examine IT-based and non-IT-based transfer mechanisms and different categories of knowledge loss, while Massingham's longitudinal study examines how knowledge loss can generate organizational consequences over time. The literature therefore supports a portfolio approach in which preservation mechanisms are matched to the characteristics of knowledge at risk.

4. Research Methodology

4.1 Research Design and Simulation Architecture

The study employs a simulation-based explanatory design because no actual employee departure records, organizational memory assessments, succession files, operational-error logs, or knowledge-repository analytics were provided. The simulation is designed to translate the theoretical framework into observable indicators without presenting synthetic values as evidence from actual employees or organizations.

Five organizational-memory conditions were constructed, representing preservation maturity levels of 20%, 40%, 60%, 80%, and 100%. The lowest condition represents largely reactive offboarding in which preservation depends heavily on informal individual effort. Intermediate conditions progressively introduce knowledge-risk identification, structured handovers, successor participation, reusable repositories, and follow-up learning. The highest condition represents a mature but not perfect memory-continuity system.

The analytical scenarios were intentionally prevented from reaching perfect outcomes. Even organizations with highly developed knowledge-retention practices cannot preserve every element of experiential expertise because some knowledge remains difficult to articulate, some departures occur unexpectedly, organizational contexts change, and successors may interpret prior experience differently. This assumption is consistent with knowledge-transfer literature emphasizing that knowledge is embedded within organizational contexts rather than existing as a completely detachable object.

4.2 Organizational Memory Preservation Maturity Index

The proposed Organizational Memory Preservation Maturity Index (OMPMI) measures six interconnected dimensions:

$$[\text{OMPMI} = 0.20\text{KI} + 0.20\text{TT} + 0.15\text{EC} + 0.15\text{SR} + 0.15\text{KR} + 0.15\text{RI}]$$

where (KI) represents critical-knowledge identification, (TT) tacit knowledge transfer, (EC) explicit knowledge capture, (SR) successor readiness, (KR) knowledge retrievability, and (RI) reintegration into organizational routines.

Critical-knowledge identification and tacit transfer receive the highest weights because preservation resources should first be directed toward knowledge whose disappearance would materially



affect continuity and toward knowledge that cannot be adequately preserved through documentation alone. These weights are theoretical design parameters rather than empirically derived coefficients.

Table 1: Operationalization of the Organizational Memory Preservation Framework

Dimension	Weight	Operational Meaning	Illustrative Preservation Practice
Critical-Knowledge Identification	0.20	Recognition and prioritization of knowledge vulnerable to employee departure	Knowledge-risk map, dependency assessment, critical-role inventory
Tacit Knowledge Transfer	0.20	Transfer of experiential knowledge through social interaction	Shadowing, mentoring, demonstrations, guided problem solving
Explicit Knowledge Capture	0.15	Conversion of appropriate knowledge into durable organizational records	Process notes, decision histories, technical guides, lessons learned
Successor Readiness	0.15	Capability of another organizational member to receive and apply transferred knowledge	Overlap period, successor participation, competency verification
Knowledge Retrievability	0.15	Ease with which preserved knowledge can subsequently be found and interpreted	Searchable repositories, metadata, ownership, version control
Organizational Reintegration	0.15	Reuse of retained knowledge in routine work after departure	Updated workflows, onboarding resources, communities of practice

Source: Author-developed framework informed by Walsh and Ungson, Argote and Ingram, Argote, McEvily, and Reagans, and Levy.

The framework intentionally combines technological and human mechanisms. Levallet and Chan's work indicates that knowledge-retention mechanisms differ in effectiveness depending on the type of knowledge involved, supporting the premise that no single transfer mechanism is sufficient for every knowledge category.

4.3 Outcome Measures and Evaluation Procedure

Five outcome measures were selected. Critical knowledge preserved represents the estimated proportion of identified high-priority knowledge that remains usable after an employee departure. Undocumented process loss represents important operating knowledge that exits without an adequate retained representation. Successor stabilization time represents the number of working days required for a



successor to perform routine responsibilities with acceptable independence. Repeated knowledge-related problems represent recurring errors or questions attributable to unavailable historical or procedural knowledge. Retrieval confidence represents the modeled probability that retained knowledge can be located and interpreted when required.

The five maturity scenarios were assigned progressively stronger outcomes based on the theoretical proposition that identification, transfer, capture, successor participation, and retrieval together reduce memory discontinuity. The values are deliberately illustrative and no inferential statistical claims are made. The simulation therefore provides a transparent analytical demonstration rather than an artificially precise empirical test.

The methodological approach is consistent with the need to distinguish conceptual modeling from empirical validation. In real organizations, OMPMI would require construct development, expert assessment, reliability testing, validation across multiple occupations, and linkage to observed turnover and performance outcomes. Longitudinal research would be especially valuable because the effects of knowledge loss may emerge after the departing employee is no longer available to explain missing context. Massingham's longitudinal study demonstrates the value of examining knowledge-loss consequences over an extended period.

5. Analysis

5.1 Critical-Knowledge Preservation Across Maturity Conditions

The simulation indicates a progressive increase in critical-knowledge preservation as organizational-memory maturity improves. Only 43% of identified critical knowledge remains operationally usable in the 20% maturity scenario. Preservation increases to 55% at 40% maturity, 68% at 60%, 80% at 80%, and 89% under the mature preservation architecture.

The relationship reflects the cumulative contribution of multiple mechanisms rather than documentation alone. At low maturity, the organization reacts after turnover becomes imminent and depends mainly on handover notes. At higher maturity, knowledge vulnerabilities have already been mapped, successors participate directly in transfer, explicit information is organized for retrieval, and experiential knowledge is transferred through interaction. This combined approach is consistent with established literature distinguishing knowledge embedded in people and organizational relationships from knowledge amenable to formal codification.

Table 2: Simulated Outcomes Across Organizational Memory Preservation Maturity Levels

Memory Preservation Maturity	Critical Knowledge Preserved	Undocumented Process Loss	Median Successor Stabilization	Repeated Knowledge-Related Problems	Knowledge Retrieval Confidence
20%	43%	38%	24 working days	29%	48%



Memory Preservation Maturity	Critical Knowledge Preserved	Undocumented Process Loss	Median Successor Stabilization	Repeated Knowledge-Related Problems	Knowledge Retrieval Confidence
40%	55%	31%	19 working days	24%	58%
60%	68%	23%	14 working days	18%	68%
80%	80%	15%	9 working days	13%	78%
100%	89%	9%	6 working days	8%	86%

Note: All numerical values are simulated analytical scenarios and do not represent observations from real organizations.

5.2 Reduction in Knowledge Gaps and Successor Stabilization Time

Undocumented process loss declines from 38% in the fragmented preservation condition to 9% in the mature condition. This modeled decline reflects greater use of knowledge-risk analysis and selective codification. The purpose is not to document every activity performed by departing employees. Excessive documentation can create information volume without improving retrieval. Instead, preservation should identify consequential exceptions, decision rationales, recurring problems, critical relationships, specialist procedures, and knowledge for which alternative organizational sources are limited.

Levy's framework is relevant because it emphasizes selecting the scope of retention before documenting and subsequently integrating retained knowledge into organizational practice. A preservation system therefore becomes inefficient when it treats every piece of employee information as equally valuable. Knowledge-risk prioritization enables organizations to allocate transfer time toward the information whose disappearance would create the greatest operational or strategic vulnerability. Successor stabilization time decreases from a simulated median of 24 working days to 6 working days.

This improvement reflects successor involvement before departure rather than passive receipt of an archive afterward. Tacit knowledge frequently requires demonstration and contextual explanation; consequently, an overlap period that includes observation, guided practice, scenario discussion, and access to decision histories may provide stronger continuity than a document-only handover. Research on knowledge retention among older and retiring workers similarly emphasizes individual, relational, and contextual conditions surrounding knowledge transfer.

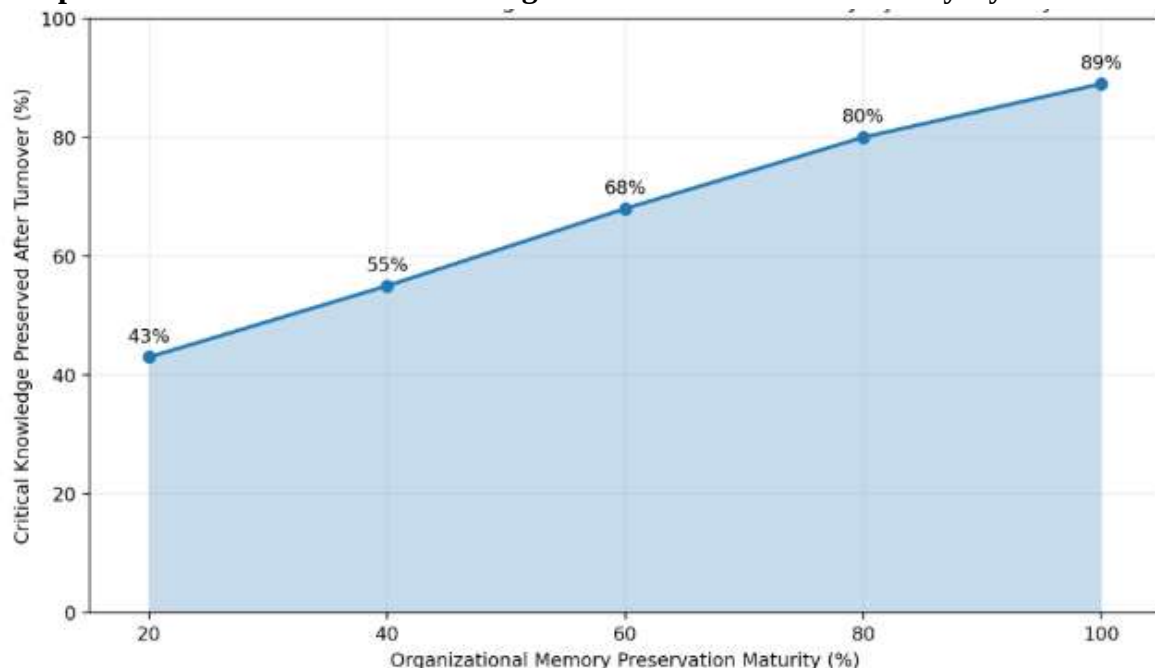
5.3 Retrieval, Reuse, and Repeated Organizational Problems

Retrieval confidence increases from 48% to 86% across the modeled maturity conditions. This measure addresses an important distinction between preserved information and usable memory. Information that exists somewhere in an organization's digital environment has limited continuity value when successors do not know that it exists, cannot find it, encounter conflicting versions, or cannot understand why a previous decision was made.

Information systems can support organizational memory by extending the capacity to store and retrieve information, but technological repositories need appropriate organizational context and use mechanisms. Stein and Zwass explicitly examined how information systems can actualize organizational memory, while Levallet and Chan later distinguished the effectiveness of IT- and non-IT-based knowledge-transfer mechanisms for different forms of knowledge.

Repeated knowledge-related problems decline from 29% to 8% in the simulation. Recurrence is conceptually important because forgotten solutions can force organizations to rediscover answers to previously solved problems. Organizational memory creates value when retained experience changes subsequent action rather than simply remaining in storage. The declining recurrence pattern therefore represents the reintegration dimension of the proposed framework.

Graph 1: Simulated Critical-Knowledge Preservation Across Memory-System Maturity



Supporting data: 20% maturity = 43% critical knowledge preserved; 40% = 55%; 60% = 68%; 80% = 80%; and 100% = 89%.

Interpretation: The simulated area graph demonstrates progressively stronger organizational-memory preservation as the maturity of the retention system increases. The relationship reflects an intentionally constructed theoretical scenario rather than an empirically estimated effect.



Key finding: The modeled benefit becomes substantial when organizations move beyond end-stage documentation toward early knowledge-risk identification, interpersonal transfer, successor preparation, searchable capture, and post-departure reuse.

6. Discussion

6.1 Organizational Memory Should Be Preserved Before the Exit Event

The first major implication is temporal. Knowledge preservation should begin before an employee formally announces departure. A reactive model creates a structural disadvantage because the organization may have only a short notice period in which to determine what the departing employee knows, identify appropriate recipients, document complex work, and validate the successor's understanding. Knowledge-retention literature has repeatedly emphasized the value of identifying critical knowledge and establishing deliberate transfer arrangements rather than waiting until the departure becomes imminent.

A proactive approach therefore requires knowledge vulnerability mapping. Roles can be assessed according to the uniqueness of expertise, availability of knowledgeable substitutes, degree of tacit knowledge, external relationship dependence, operational criticality, and time required for replacement learning. Such an assessment does not assume that experienced or senior employees always possess the most critical knowledge. A relatively junior specialist can represent a major memory risk when a technical process or customer relationship is concentrated almost entirely in that individual.

This approach also changes the role of succession planning. Conventional succession planning often focuses on identifying who might occupy a position. Organizational memory preservation adds a second question: what must move from the departing role holder into the organization before the personnel transition is complete? Successor identification without knowledge-transfer architecture can therefore create nominal succession while leaving substantial operational knowledge behind.

6.2 Codification and Human Transfer Must Operate Together

The second major implication concerns the longstanding distinction between codification and personalization. Documentation is indispensable for repeatable procedures, technical information, policy requirements, decision records, and factual reference material. Yet Nonaka's theory and subsequent knowledge-transfer research caution against assuming that all important knowledge can be fully separated from experience and social context.

A mature preservation system should therefore match the method to the nature of the knowledge. A regulatory checklist can normally be codified. Troubleshooting judgment developed through hundreds of unusual cases may require guided practice. A customer's formal contract can be stored, whereas the history of stakeholder expectations may need relational transfer. A technical configuration can be documented, while knowing which apparently minor signal usually indicates an emerging failure may depend on expert demonstration.

Martins and Meyer specifically emphasize organizational and behavioral factors influencing tacit-knowledge retention, and Burmeister and Deller's review highlights the importance of knowledge, individual, relational, and contextual antecedents. These findings support a mixed preservation strategy involving structured interviews, observation, mentoring, joint task execution, decision narratives,

process documentation, communities of practice, and searchable repositories rather than relying on a single method.

Technology should consequently amplify human memory-transfer processes rather than substitute for them indiscriminately. A repository becomes valuable when it stores meaningful artifacts connected to work practices and makes them discoverable to people who understand their relevance. The simulation's retrieval dimension reflects this principle: storing additional files does not improve preservation unless employees can subsequently locate, interpret, and apply them.

6.3 From Knowledge Retention to Organizational Learning Continuity

The third implication is that organizational memory preservation should be judged by subsequent reuse rather than by handover completion. Organizations commonly treat the departing employee's final day as the endpoint of knowledge transfer. The present framework instead treats departure as a midpoint. The successor must still apply the retained knowledge, identify missing information, revise obsolete material, and integrate acquired learning into current routines.

Argote, McEvily, and Reagans conceptualize organizational knowledge management through creation, retention, and transfer, while Levy explicitly includes organizational integration as part of successful knowledge retention. The implication is that organizational memory is dynamic. Retaining past knowledge should not freeze obsolete practices; preserved knowledge provides a contextual starting point that future organizational members can interpret, modify, and improve.

This distinction is particularly important because organizational forgetting is not universally harmful. Some routines may be obsolete, inefficient, or associated with outdated technologies and assumptions. Preservation should therefore focus on maintaining access to valuable experience and decision rationale while still allowing organizational adaptation. Mature memory systems preserve knowledge selectively rather than treating every historical practice as something that must continue indefinitely.

The reduction in simulated repeated problems illustrates this learning-continuity principle. The ultimate purpose of memory preservation is not archival completeness but improved organizational capacity to avoid unnecessary relearning. When successors understand what was tried previously, which solutions worked, why exceptions occurred, and how critical relationships developed, workforce turnover becomes less likely to force the organization to reconstruct its own operating history.

7. Conclusion

Workforce turnover is simultaneously a human-resource event and an organizational-memory event. When employees depart, organizations do not lose only labor capacity; they can also lose experiential knowledge, relationship histories, technical judgment, procedural understanding, decision rationale, and lessons accumulated through previous organizational activity. The severity of this loss depends upon how strongly knowledge remains concentrated in the departing employee and whether effective alternative organizational repositories and transfer relationships exist.

This study developed an Organizational Memory Preservation System comprising critical-knowledge identification, tacit knowledge transfer, explicit knowledge capture, successor readiness, knowledge retrievability, and organizational reintegration. The framework deliberately moves beyond



the assumption that documentation constitutes complete memory preservation. Knowledge-management theory indicates that knowledge is embedded across people, interactions, routines, tasks, tools, and organizational structures, requiring preservation strategies that combine interpersonal and technological mechanisms.

The simulation illustrates the expected logic of such a system. Critical-knowledge preservation rises from 43% to 89% as simulated maturity increases, while undocumented process loss, successor stabilization time, and repeated knowledge-related problems decline. These values are not empirical findings and should not be interpreted as expected percentages for real organizations. Their function is to operationalize the theoretical relationships and establish measurable propositions suitable for later testing.

Future empirical research should test the OMPMI across knowledge-intensive and operational settings using real departure events, successor performance records, knowledge-repository analytics, process-error data, and longitudinal interviews. Research could examine whether preservation effectiveness differs between voluntary resignations, retirements, restructuring-related exits, internal transfers, and unexpected departures. Additional studies should evaluate whether the relative effectiveness of documentation, mentoring, shadowing, expert interviews, communities of practice, and digital repositories varies according to knowledge complexity and role characteristics. The overall conclusion is that organizational memory survives workforce turnover most effectively when knowledge continuity is designed as an ongoing organizational capability rather than treated as an administrative task performed only when an employee leaves.

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