Knowledge Transfer Plan

[The role being handed over, for example: Accounts payable specialist, Finance]

Role	[Job title and team]	**Reason**	[Resignation, retirement, internal move, leave or contract end]
Leaving or moving	[Role, then name]	**Receiver(s)**	[Role, then name]
Plan owner	[Usually the manager, not the leaver]	**Plan agreed**	[YYYY-MM-DD]
Last day	[YYYY-MM-DD]	**Handover files**	[Shared folder or link]

1. Handover summary

Three lines a stranger could read in a minute: what the role is for, what has to keep running after the last day, and who decides that the handover is done.

- **What the role is for:** [one or two sentences]
- **What must keep running after the last day:** [the work that would hurt first]
- **Who signs off the handover:** [the plan owner]

2. Knowledge inventory

List tasks, not job-description duties. Go through the last three months of calendar, sent email, tickets and reminders, and the last twelve months for yearly tasks. Priority 1: the work stops or goes wrong and nobody else can do it, so it moves first and needs proof. Priority 2: someone can partly cover it. Priority 3: low impact or already shared.

Task or knowledge	How often	If it stopped	Who else can do it	Priority

3. How each task moves

One row per task from section 2, priority 1 first. Choose the method from the kind of knowledge: record a real run for work done on a screen, shadowing and worked cases for judgment, a walk-through of last time's files for rare tasks, introductions for relationships. Proof is something the plan owner can check, such as the receiver doing the task alone.

Task	Receiver	How it moves	Due	Proof it moved

4. Week-by-week schedule

Start the week notice is given. Put recording and shadowing first, the receiver doing the work with the leaver watching in the middle, and the receiver working alone before the last day. A weekly task needs at least two runs inside the plan; a monthly task needs one.

Week	The leaver	The receiver	The plan owner
1			
2			
3			
4			

5. Access, accounts and tools

Every system, shared inbox, account and subscription the role uses. Access moves through each system's own process to the receiver's own account. Never write passwords in this plan or pass them on, and end the leaver's access on the last day.

System or account	Used for	Moves to	How	Done

System or account	Used for	Moves to	How	Done

6. Contacts and relationships

People inside and outside the company who call, email or depend on this role. Introduce the receiver before the last day, in person or by email, and say why the contact matters.

Contact	Why they matter	Introduced by, when

7. Open work and upcoming dates

Work in progress, promises made to anyone, and dates in the next twelve months, including yearly tasks. Every item needs a new owner and a next date.

Item	Status	Next date	New owner

8. Sign-off and after the last day

Sign off on proof, not because the last day has come. Anything that cannot be proven yet, such as a yearly task, gets an owner and a check date.

Done	Check	Notes
	Every priority 1 task has its proof in section 3, or a written reason and a check date.	
	Recordings, guides and notes are saved in the handover folder, and the receiver can find them.	
	All access in section 5 has moved, and the leaver's access ends on the last day.	
	Every contact in section 6 has been introduced.	
	Every item in section 7 has a new owner and a next date.	

- **Questions after the last day go to:** [the leaver, if agreed and until when, or the plan owner]

- **Check-in date:** [about 30 days after the last day, when the plan owner and the receiver go through what came up]
- **Still open:** [anything not proven yet, with its owner and check date]

Role	Signature	Date
Leaver: [role]		
Receiver: [role]		
Plan owner: [role]		

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