

This tool is designed to help you develop an overarching knowledge transfer plan for your organization to assist with creating a knowledge sharing culture. A template for specific positions has also been included that can be used if there is a known leadership transition that will be occurring.

**KNOWLEDGE TRANSFER PLAN**

# step 1 – identify the knowledge you need to gather and from whom

Start by asking a few questions and completing this table.

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| **Who are the “go to people” in your organization with specialized knowledge?** | **What knowledge do they only know?** | **If they left today, would anyone know how to do what they do?** | **How available is this information?** | **What sort of impact will it have if others do not have this knowledge?** |
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# step 2 - identify how knowledge will be obtained and transferred

**When you need to identify how knowledge will be obtained and transferred, ask yourself the following questions:**

* How quickly does this knowledge transfer need to occur (days, weeks, or months)?
* How many people should be involved in the process?
* How much effort and time commitment are required?
* What is the depth and complexity of the knowledge that needs to be transferred?
* Is it explicit or tacit knowledge?

**The following knowledge transfer methods have been listed to assist you in completing the table on the next page:**

Formal mentoring program

Informal mentoring

Peer mentorship

Job shadowing or job rotation

Cross training

Communities of practice

Dedicated time in team meetings to sharing knowledge

In-house training (online modules or hands-on staff training)

Video recordings. This could be done in an interview format or just short recordings of different knowledge areas that will help successors

Record important information shared at meetings or events

Employee handbook(s)

Written and verbal communication of success stories

Lessons learned from past projects through debriefing(s) or reports

Document repositories and archived materials that are easily accessible

Flow charts or process documents

User guides on how to perform specific functions

Frequently Asked Questions (FAQs) documents for each mission-critical role

**How organizational knowledge identified in Step 1 will be obtained and transferred**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **What** | **Who** | | **How** | **When** | **Follow-up** |
| **Skill/Task/Knowledge** | **Knowledge**  **Owner(s)** | **Knowledge Recipient(s)** | **Method(s)** | **Timeframe** | **Successful transfer Criteria** |
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**Knowledge transfer plan template for a specific role with a known departure date**

*Please copy this table for additional roles with known departure dates and paste after this page*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Position:** | | **Departure Date:** | | |
| **Skill/Task/Knowledge** | **Knowledge Recipient(s)** | **Method(s)** | **Timeframe** | **Successful transfer Criteria** |
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# what strategies do you plan to implement in the next 6, 12, and 18 months across the organization?

Formal mentoring program

Informal mentoring

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Other:

|  |  |
| --- | --- |
| **Timeframe** | **Strategies to Implement** |
| 6 months |  |
| 12 months |  |
| 18 months |  |