

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**

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| --- | --- | --- | --- | --- |
| **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

[ ]  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

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[ ]  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

Other:

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