Knowledge Capture and Transfer Template

Ensuring a Smooth Transition When an Employee Leaves

Introduction

Knowledge capture and transfer are essential for ensuring continuity by preserving critical information within an organization. There are many ways to capture and transfer knowledge, but this template includes documenting critical knowledge, skills, and responsibilities for the successor or existing team members.

Employee Information

Name:	**Position:**
Department:	**Last Working Day:**
Future contact information (email / phone):	

Key Responsibilities:

List the main duties and responsibilities of the position. Include ongoing projects, recurring tasks, and special duties. (Ongoing projects, recurring tasks, special duties)

Systems and Administrative Access:

List the systems and administrative access linked to the position.

- Systems – Banner Forms, Financial Systems (FAST), Concur, approvals
- **Administrative – WDrive, Teams, Jira groups, shared mailboxes, Outlook groups, social media, subscriptions, software, recurring payments**

Critical Knowledge Areas:

Identify and describe the essential knowledge areas that need to be transferred.

(Technical skills and expertise, process knowledge, client or stakeholder relationships, historical information and context)

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Key Contacts:

List important contacts that the successor or team members should be aware of. Format: Name/Role/Contact information/Project or process connection

Additional Information:

Is there other information that you feel would be helpful for us to know? (Information, details, ideas)

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Project or Process Details

Project / Process Name	Description	Key Stakeholders	Current Status	Important Deadlines	Successor (who will fill your role)	Documentation links and folders

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Yearly Overview

Outline the events / reports / activities / processes that are planned for this coming year, or that take place on an annual basis that fall under the position's responsibilities (whether in a leading or supporting role).

Month	Event / Report / Activity / Process	Details
Example	E.G. Annual Budget Report	Preparation and submission of the annual budget report
January		
February		
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		

Completing the Knowledge Capture and Transfer Template

Outlined below are some considerations and questions you may want to consider in advance to help inform your responses and ability to complete the Knowledge Capture and Transfer Template.

Knowledge transfer methods

- [ ] What are the methods used to transfer knowledge?
  - [ ] Documentation - manuals, guides
  - [ ] One-on-one sessions – meetings with team members
  - [ ] Training sessions – hands on training or workshops
  - [ ] Shadowing – observing the work

Documentation

- [ ] Are key documents up to date?
- [ ] Are documents saved in the right folders – that have the right permissions (i.e. will people be able to access the information they need)?
- [ ] What documents or information are missing?

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Knowledge Capture and Transfer Checklist

This checklist is for the supervisor / manager / director to support the planning for, and implementation of, knowledge capture and transfer.

- [ ] Discussion about knowledge capture and transfer with employee
- [ ] Completion of the template
- [ ] Missing documentation created
- [ ] All activities / projects assigned new “owner”
- [ ] Cross-training opportunities identified and provided
- [ ] Equipment returns