Knowledge Transfer Plan

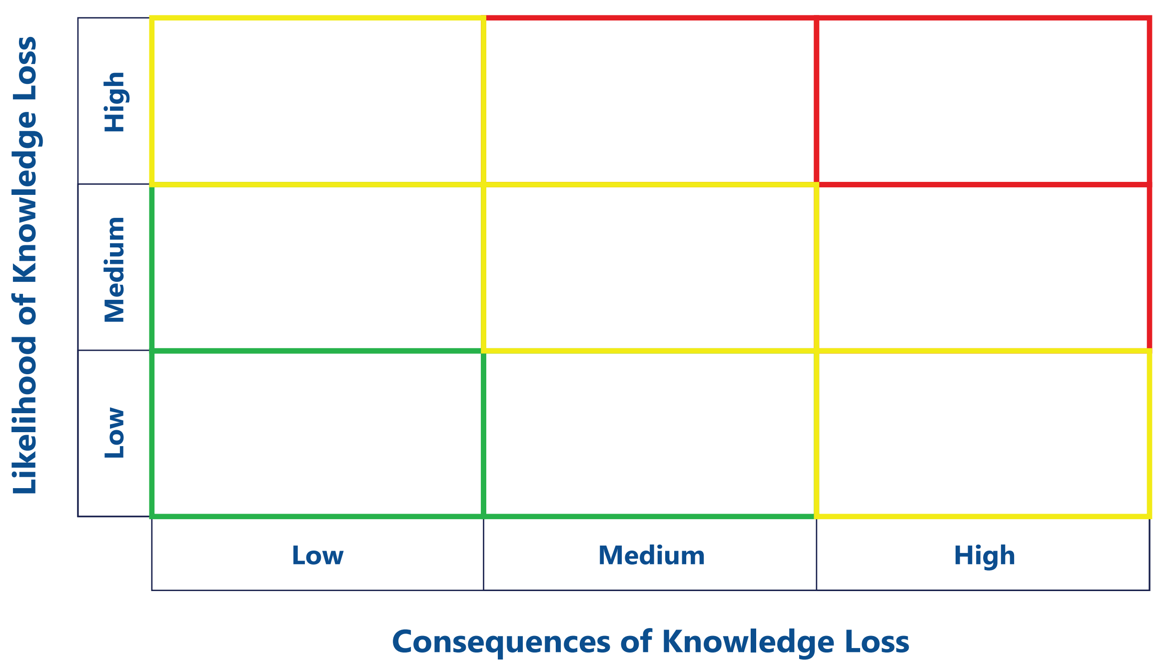
KNOWLEDGE MANAGEMENT

Purpose

Knowledge Transfer Plans help identify critical or uncommon knowledge and aim to capture, store and transfer that knowledge before the employee's departure. Follow the strategic framework below to prioritize knowledge transfer needs and select appropriate methods to facilitate the transfer of information.

Steps to Knowledge Transfer:

- **Step 1: In the knowledge map (p2), identify critical knowledge areas to support your organization's short- and long-term goals.** Provide details on the knowledge topic(s) that would be lost upon the employee's departure. Use questions from the Knowledge Capture Expert Interview PDF document to guide your conversation and identify critical knowledge, as defined below:
    - **Critical Knowledge Criteria:**
        - Knowledge that is essential to the organization's strategic priorities, products, and / or ongoing operations to ensure business continuity.
        - Not documented anywhere and resides only in the minds of one or a handful of employees.
        - Experiential knowledge; specific knowledge that is learned through experience.
        - Cannot be found through external resources (books, research, internet).
- **Step 2: Prioritize competing knowledge needs through a Knowledge Loss Risk Assessment.**
    - After identifying knowledge gaps and needs, it will be important to decide what to tackle first. Use the Knowledge Loss Risk Matrix below to prioritize knowledge needs.
    - Green = Low Risk, Yellow = Medium Risk, Red = High Risk



- **Step 3: Determine what Knowledge Transfer methods to apply.**
    - Assign knowledge transfer methods to each of the knowledge areas identified in Step 1 in the Knowledge Map. Please visit: Knowledge Transfer Methods PDF document.
    - More than one method can be applied.
    - If possible, determine which people or teams the knowledge will be shared with.
- **Step 4: Enter a target completion date or identify whether the action will be an ongoing process.**

Knowledge Map

To use an Excel spreadsheet, visit: Knowledge Map Excel document.

Categories of Knowledge	**Step 1:** Describe the critical, uncommon, undocumented knowledge or expertise.	**STEP 2:** Knowledge Loss Risk Score	**STEP 3:** Knowledge Transfer Method	**STEP 4:** Completion Date
Unique Tasks or Procedures - *List any special tasks, processes or procedures that only this employee performs.*				
Historical Knowledge - *Describe any historical knowledge (i.e. lessons learned) that this employee has that might help inform future decisions and / or to avoid the repeat of a major error in the future.*				
Complex Troubleshooting and Diagnosis - *Describe or list any uncommon knowledge that employee possesses or has developed about the diagnosis of complex problems and any potential failures related to the problem.*				

Predictive Patterns - *Describe or list any special knowledge employee thinks he / she may have about patterns of performance that predict decisions and inform processes. These are patterns that are not obvious and that may be missed by inexperienced personnel.*				
Vital Connections - *List specific external and internal contacts such as vendors, stakeholders, resourceful people, etc. Include people to reach out to for expert advice, decisions, permissions and getting something processed or expedited.*				
Miscellaneous - *List any other types of knowledge not described in the above categories that this employee may possess.*				

Feedback: Do you have a suggestion for improvement? Please click here to submit your feedback.