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| Name: | Name of skill, task or knowledge area. |
| Basic Information | Basic information on who is completing the knowledge transfer and any special transition or handover arrangements. |
| Objectives & Responsibilities | The objectives of the role and key responsibilities, including any direct reports. |
| Deliverables | Information on deliverables such as a full list of work in progress and a project or task status report for all deliverables including those that have not yet been started. |
| Meetings | A schedule of meetings – dates, times and attendees for all regular meetings and an intranet link to the database of minutes and agendas. |
| Contacts | A full list of key relationships and contacts both internal and external. |
| Compliance & Reporting | Information on any internal or external compliance and reporting requirements. |
| Information | Details on where key information is stored and how it can be accessed. Usually, this will be elsewhere on the intranet and so there needs to be a link to the relevant intranet page where all the essential reference material, standard operating procedures, policy documents, manuals and so on are stored. |
| Budgetary & Financial | Budgetary information including personal reporting responsibilities as well as the overall team or project financials. |
| Risks | Risks – details on the management and mitigation of risks that are assigned to the role and the wider team. |
| Lessons Learned | Lessons learned – this reflects the need to transfer tacit wisdom as well as hard facts and figures. It’s an opportunity to pass on the accumulated insights, understanding and expertise that the current job holder possesses. |