

KNOWLEDGE TRANSFER PLAN TEMPLATE

Employee: _____ Position: _____

Position Risk Factor (Rating Scale of 1-5) _____

Summary and Situation Assessment:

At-Risk Knowledge or Skill	Knowledge Criticality Score [High Priority – Priority – High Importance – Important-]	Method(s)	Actions List steps which can and will be taken to transfer/retain critical knowledge or minimize the impact of its loss	Target Date For Completion	Status

Plan prepared by: _____

Reviewed by: _____

Date: _____

Date: _____

Additional Notes or Coordination Needed:

KNOWLEDGE TRANSFER PLAN

Directions:

Knowledge Transfer Plans should be developed for knowledge and skills identified (in Step 1) as the most critical. Plans may include both **(1) methods to retain the critical knowledge and skills**, and **(2) actions necessary to mitigate the negative impact of losing the knowledge and skills**.

(1) Methods:

There are a variety of methods to address impending loss of critical knowledge and skills. These include:

Education & Coaching

- ✓ Job Shadowing
- ✓ On the Job Training (OJT)
- ✓ Training
- ✓ Mentoring Partnerships

Process Re-engineering

- ✓ Best Practices Meetings
- ✓ Lessons Learned Reviews

Documentation and Codification

- ✓ Job Aids
- ✓ Knowledge Maps
- ✓ Process Documentation
- ✓ Document Repositories
- ✓ Expert Systems
- ✓ Expert Interviews and Video

Alternative or Shared Resources

- ✓ Job Rotation
- ✓ Returned Retirees
- ✓ Communities of Practice
- ✓ Story Telling

[Knowledge Transfer Methods](#)

(2) Actions:

Once you have identified the best method that best fits the type of knowledge to be transferred and the work environment, the next step is to identify steps which will be taken to retain this critical knowledge or skill and/or minimize the impact of its loss. Please note: It may be necessary to use more than one method to transfer the critical knowledge.