

Knowledge transfer plan: operations coordinator

Northwind, a made-up online shop. Filled in at the end of week 4.

Leaver	Dana, operations coordinator
Successor	Sam, operations assistant
Manager	Priya, head of operations
Plan start	28 September 2026
Last day	23 October 2026

Task inventory

Task	Frequency	System	Guide recorded (date, where)	Tested by successor (date)	Exceptions noted
Export last month's paid orders	Monthly, first working day	Cartwell	Yes, 1 Oct, Ops procedures folder	19 Oct, on September's orders	2
Issue refunds on approved requests	About 10 a month	Paynest	Yes, 6 Oct, Ops procedures folder	14 Oct	1
Renew the carrier's rates	Yearly, November	Carrier portal	Walk-through, 30 Sep	Walked through, 21 Oct	1
Weekly stock report to purchasing	Weekly, Monday	Cartwell, scheduled	No: runs by itself	Moved to Sam's account, 14 Oct	0
Supplier emails in ops@	Daily	Shared mailbox	No: shadowed in week 2	Sam answered alone, 16 Oct	0

Accounts and access

System	Role needed	Owner or admin	Access arranged (date)
Cartwell	Finance	Priya	29 Sep
Paynest	Payments	Priya	29 Sep
Carrier portal	Own login (Dana's is personal)	The carrier's account manager	Requested 30 Sep, received 5 Oct
ops@ mailbox	Member	IT	29 Sep

Exceptions and contacts

Who	For what	How to reach them
Lena, finance lead	Owner of the export guide; customers on the old price list	Finance channel
The carrier's account manager	Yearly rate renewal	Through the carrier portal's contact form

Schedule

Week	What happens
1 (28 Sep)	Inventory and accounts list; access requested; carrier rates walked through; monthly export recorded on its real run, 1 Oct
2 (5 Oct)	Refunds recorded, 6 Oct; exceptions noted on their steps; Sam shadows the ops@ mailbox
3 (12 Oct)	Test runs, Dana watching without helping: refunds 14 Oct, ops@ 16 Oct; stock report moved to Sam's account
4 (19 Oct)	Export tested on September's orders; carrier rates walked through again; sign-off on 22 Oct

Sign-off

Every task in the inventory has been done by the successor without help, or is marked as walked through. The carrier rates stay marked as walked through; Priya and Sam do them together in November.

Manager: Priya Date: 22 October 2026