

Knowledge transfer plan: [role]

Replace every text in [brackets]. Never write a password into this plan: access goes through the password manager or IT.

Leaver	[Name, role]
Successor	[Name, role]
Manager	[Name; keeps this plan and signs it off]
Plan start	[First day of the notice period]
Last day	[Date]

Task inventory

Every recurring task. Yearly and quarterly tasks first. A browser task gets a recorded step-by-step guide; open work gets one line (status, next step, date).

Task	Frequency	System	Guide recorded (date, where)	Tested by successor (date)	Exceptions noted
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]

Accounts and access

Include what runs under the leaver's own account: shared mailboxes, scheduled reports, automations.

System	Role needed	Owner or admin	Access arranged (date)
[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]

Exceptions and contacts

Write each exception as a note on the step it changes in its guide. Here: only the people to ask and outside contacts.

Who	For what	How to reach them
[]	[]	[]
[]	[]	[]

Schedule

Week	What happens
1	Task inventory and accounts list; access requested; yearly and quarterly tasks walked through and recorded; tasks due this week recorded as they run
2	Remaining browser tasks recorded, exceptions noted on their steps; successor shadows the daily work
3	Test runs: the successor does each task alone from its guide, the leaver watches without helping; every question becomes an edit
4	Edited tasks tested again; scheduled reports and automations moved; guides stored with the team's procedures; sign-off

Sign-off

Every task in the inventory has been done by the successor without help, or is marked as walked through.

Manager: _____ Date: _____