

Knowledge Transfer Checklist

A suggested template that you are free to use and adapt to your own requirements. As you can see, the template can be used to capture knowledge in relation to a process, skill or task and not just for a jobholder or role. In addition, the knowledge transfer method will be influenced by the source of the knowledge as well as the recipient and by what's possible within your business depending on its size and capabilities. Please refer to the knowledge transfer examples listed above for some inspiration.

Name	Job role/area of expertise/process/task/skill	Knowledge transfer method
Overview	A brief overview of the context and the knowledge transfer that is being conveyed.	
Objectives & responsibilities	A summary of the overall objectives and responsibilities of the jobholder or the task, process or skill.	
Deliverables	<p>In relation to a jobholder this encompasses detailed information on work in progress and a status report for all projects.</p> <p>For a task or process describe the required outputs and the milestones towards their achievement.</p>	
Contacts	A full list of internal and external contacts required for completion of the jobholder's duties or to achieve the task or process.	
Meetings	A schedule of meetings relevant to the jobholder's duties or for completion of the task with an accompanying database of minutes and agendas.	
Compliance & regulatory requirements	Details of any central or local regulations and compliance requirements	
Budgetary & financial	Information on any budgetary or financial parameters within which the jobholder or task operates. Details on how budgets are set as well as the assignment of reporting responsibilities.	
Risks	Details of any risks associated with the jobholder's duties or in relation to the task, their management and mitigation.	
Tacit knowledge	<p>A record of the insights, accumulated wisdom and knowledge of the jobholder.</p> <p>In relation to a task or process, information on what works well and why and acquired expertise in relation to the execution of the task.</p>	