

CHECKLIST | Offboarding: Transferring Knowledge

Presented by Foundation Benefits

When an employee leaves an organization, employers must complete a great deal of work in a short time frame to offboard that employee. One of the most urgent offboarding tasks for any organization is the transfer of knowledge, as departing employees often possess critical knowledge, insights or skills that aren't documented. If that information leaves with the departing employee, an employer will often struggle to regain the critical knowledge or skill set, potentially forever altering the organization's workflow and performance. A knowledge transfer is a process of capturing critical information, skills and experience from departing employees to store and share within an organization, ensuring it isn't lost.

Overview

With so many offboarding tasks to be completed, organizations often fail to devote sufficient time to knowledge transfer, risking the loss of critical information that can have lasting repercussions. Formalizing the knowledge transfer process can help organizations gather all relevant skills, information and experience and transfer them to others when an employee departs.

This checklist outlines the steps for transferring knowledge of departing employees. This checklist is intended to be used as a guide, and not all of the following steps are necessary to transfer an employee's knowledge or expertise. The knowledge transfer process may differ based on your organization's size and other factors, such as whether the employee is departing voluntarily or involuntarily; thus, the steps in this list should be modified to meet the unique needs of your organization. This checklist is to be completed by a supervisor, manager or HR representative to help ensure a smooth offboarding process and that critical knowledge and skills are being passed on.

Initial Steps	Yes	No	N/A
Identify all knowledge, information and skills that need to be preserved from the departing employee by reviewing the employee's job description, duties, responsibilities, assignments and work product.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create learning logs or a knowledge database to retain employee knowledge and share it with others.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establish proactive practices to share employee knowledge regularly. These may include interviews, mentorships, apprenticeships, work shadowing, simulations, paired work, electronic learning, instructor-led training and practice communities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Knowledge Transfer	Yes	No	N/A
Create and document a transition plan with the departing employee to ensure the knowledge transfer is completed before the departing employee's last day.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conduct a knowledge transfer interview with the departing employee and any relevant stakeholders to assess potential skill or knowledge gaps and create a knowledge transfer plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ask the departing employee to document all necessary information to facilitate a knowledge transfer to other employees. Documentation should include the following information: <ul style="list-style-type: none"> • The departing employee's roles and responsibilities • All projects, tasks and deliverables • Client or vendor contacts • Access to programs or documents 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ask the departing employee to return all work-related documents and other information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compile a list of documents provided by the departing employee, including the locations of files, records and emails, to facilitate the transfer of knowledge to other employees in the organization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Document processes, procedures and systems the departing employee owns or interacts with to fulfill key job responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a work or project status report that may include the following: <ul style="list-style-type: none"> • A list of current, outstanding or important deadlines • A summary of ongoing regular tasks or responsibilities • A detailed list of the departing employee's open assignments and the current status of those assignments • Contact information of any individual the departing employee has been working with to complete their assignments and tasks 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request that the departing employee create a comprehensive contact list, including key individuals or external contacts that they interact with to fulfill their responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicate to other employees any temporary reassigning of the departing employee's responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schedule a meeting with the departing employee and any employees assuming the departing employee's responsibilities to transfer all necessary information and duties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluate the organization's knowledge transfer efforts after the employee departs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A successful knowledge transfer process will differ based on the unique needs of an organization. However, by regularly evaluating its knowledge transfer process, an organization can better understand whether it's effectively capturing the knowledge and skills of departing employees. It can help organizations identify any gaps in their process and adjust to avoid losing important institutional knowledge. Preserving the knowledge and skills of its workforce is essential for any organization's success in today's competitive market.

Contact Foundation Benefits today for more information about offboarding or transferring knowledge.