

# Knowledge Transfer and Handover Plan Template

This template is designed to facilitate a smooth transition of responsibilities, systems, and tasks from the outgoing team member to the incoming successor.

## 1. General Information

<b>Role / Project Name:</b>	
<b>Outgoing Owner (Handover Source):</b>	
<b>Incoming Owner (Handover Target):</b>	
<b>Manager / Supervisor:</b>	
<b>Target Completion Date:</b>	

## 2. Key Responsibilities & Daily Tasks

List the primary duties, regular schedules, and expected deliverables associated with the role.

Task / Responsibility	Frequency (Daily / Weekly / Monthly / Ad-Hoc)	Current Status / Critical Notes

## 3. Systems, Tools, and Access Requirements

Identify the applications, databases, software, and shared drives required to perform the role, and confirm if access has been requested/granted.

System/ Tool Name	Required Access Level / Role	Access Status (Pending / Granted)

## 4. Key Contacts & Stakeholders

Identify the key internal and external points of contact relevant to this position.

Contact Name	Role / Department	Contact Information

## 5. Pending Tasks, Open Projects, and Milestones

List any active projects, incomplete tasks, and upcoming critical deadlines that need immediate attention.

Project / Task Name	Current Status	Due Date	Immediate Next Steps Needed

## 6. Documentation and Resource Locations

Detail where training materials, project directories, standard operating procedures (SOPs), and shared folders are stored.

Document / Resource Title	Location / File Path / URL

## 7. Handover Approval Sign-off

By signing below, all parties agree that the knowledge transfer has been completed successfully and the successor is equipped to assume the responsibilities.

<b>Outgoing Employee Signature:</b>		<b>Date:</b>	
<b>Incoming Successor Signature:</b>		<b>Date:</b>	
<b>Manager Signature:</b>		<b>Date:</b>	