







# Who's Moving? Worksheet

Duly Knowted(R) tools can be applied to variations of six transition scenarios. Use this worksheet to anticipate or track (1) Who is or could be transitioning over the next several months, and (2) Information that will be important to capture.



<b>Knowledge Transfer at Onboarding</b>	<b>Employee Offboarding-Express</b> Two Week Notices or LESS!	<b>Employee Offboarding-Extended</b> Retirements-Phased Retirements-Career Changes	<b>Promotions, Transfers, and Leaves</b>	<b>Program or Project Best Practices/Debriefs</b>	<b>Annual Reviews and Coaching Sessions</b>
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What wisdom can incumbents share with a successor or onboarding team members?	Time is short. QUICKLY capture what needs to be handed over to others.	Prepare. Whose retirement is looming? What parts of this contributor's knowledge, network, and organizational smarts can be leveraged?	Capture continuity and in-progress notes from contributors who are "leaving," but (also) staying on with the company.	Document lessons learned and best program/project practices. Debrief good things before teams disband.	Incorporate smart capture questions into annual performance reviews or anytime coaching conversations.
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 Who is or could be in transition?					
What to capture?  What does this person know that the people staying on, need to know? About customers, deadlines, resources, how things get done?					



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