**Last Date of Employment: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**TRANSITION PLAN**

|  |  |
| --- | --- |
| **Prepared by:** | **Manager Name:** |
| **Prepared for:**  | **Role:** |

**[Provide any pertinent information, including major projects, ongoing tasks, schedules, contact information, and more]**

This transition plan will be used by **[name(s)]**  to cover all ongoing tasks, along with current projects and tasks, to ensure a smooth handover from **[name].**

As discussed with **[Name]** on **[Title],** the project oversight responsibilities, including scheduling meetings, capturing requirements, and sending out frequent status messages, will now be handled by **[Name]**. These needs are ongoing. Current challenges include… What’s left in the deliverables list is…

**Project 1:** **[Name]**

This project includes weekly meetings with the steering committee and implementation team. The responsibilities, process, people, and timings are described in the following table.

|  |  |  |  |
| --- | --- | --- | --- |
| **Responsibility** | **Task(s)** | **Team** | **Timing** |
| **Monthly project report** | Review all implementation projects for the previous month and capture the title, team, status, and outcomes in the linked/attached Excel document | Direct manager, assigned team members | Create it in the first week of the month and submit by the 5th of each month; email to all impacted team members |
| **Research current trends** | Visit company and industry websites to make sure the policies align and are clear to team members. | Policy analysis team | Ongoing research throughout the month, with a thorough update once per month |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Project 2:** **[Name]**

**Due Date:** May 12, 20XX

|  |  |
| --- | --- |
| **Milestones:** This list is not all encompassing, but does cover major milestones. For questions or to request a change to due dates, contact **[phone number]** | **Contacts:**This is a list of the main contacts who you’ll work with.* **[Name]**, **[job title]**, **[email address]**
* **[Name]**, **[job title]**, **[email address]**
 |
| **Process Steps:** 1. Instructions begin for step 1.
2. Next step and result.
3. Continue with step and show screen shots as appropriate.
 | **Files:** Word |

**Standard Assignments**

In my role, I attend implementation team meetings for all of my assignments, create drafts of information based on discussions and agency guidance, and submit information to be published. I report to [Name] and you can direct any questions to [him/her].

**Project background**

Initially, I was assigned to help improve the relationship between our department and the policy department, because a history of challenging leader expectations created a lack of trust among various groups. Since then, I have continued to be assigned more challenging and more visible tasks within both groups to further enhance our partnerships.

|  |  |
| --- | --- |
| **Daily** | * Attend meetings
* Send out status communications
 |
| **Weekly**  | * Submit news stories
 |
| **Monthly**  | * Validate the
 |
| **Annually**  | * Complete required training by end of year
 |

**Checklist**

Creating a checklist for process to follow.

|  |  |  |
| --- | --- | --- |
|  | **Task** | **Details/Document Your Progress** |
|[ ]  Create spreadsheet to allow filtering of data. | Template location: www.templateexcel.com |
|[ ]  Email managers to ask for talking points. | List of contacts included in our team process direct reports at www.teamlist.com |
|[ ]  Create PowerPoint deck to display hot topics and questions from the library. |  |
|[ ]  Send spreadsheet to sales team. |  |
|[ ]  Return phone calls related to sales team. |  |