Readiness Knowledge Transfer template

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| --- | --- | --- | --- |
| **Objective and benefits** | The purpose of this document is to help the project team document the knowledge transfer requirements from the project to the MDA team. This will include the plan for knowledge transfer sessions to be conducted prior to the system go-live and the proposed documentation to be handed over as part of the knowledge transfer. | | |
| **When to use this tool** | Knowledge transfer is an ongoing effort through the project lifecycle. As such, Knowledge transfer planning needs to occur at the initiation of the project. | | |
| **Document owner** |  | **Intended audience** | Project leaders/ managers |
| **Version** | 0.0 | **Last updated** | INSERT DATE |

**1 Introduction**

This document outlines the content of a knowledge transition plan designed to successfully transfer knowledge of all applications, procedures and processes either to the MDA business owners or from one member of an existing project team to another member of the same team. If within the same team, this will support:

1. Cross training is to happen between different resources of the same project, for ensuring better resource utilisation and/or better response.
2. Current resource needs to be replaced because:
3. Current resource moves to a different role in the same project
4. Current resource moves to a different location in the same project
5. Current resource moves out of the project.

Below is a template for the Knowledge transfer plan high-level summary that can be completed based on the MDA and programme needs. The examples within the plan are for an IT based project, however the principles can be applied to non-IT projects to ensure all relevant knowledge is captured and transferred.

***Online Performance Support System (example)***

|  |  |
| --- | --- |
| **[MDA] Owner** | *Owner #1* |
| **Transition Lead** | *Transition Lead #1* |
| **[MDA] Team to be Transitioned to** | [MDA] Content developers/process owners |
| **Transition Timeline** | August 2022 to December 2022 (for pre-Go live) |
| **Transition Methodology** | Knowledge transfer sessions to be conducted by the **Transition Lead** with the **[MDA] Owner** and **[MDA] Team to be transitioned to** |
| **Activities to be covered during transition** | * Programme Content Developers trained on how to create Self Service Portal - COMPLETE * Transition Self Service Portal source files to **[MDA] Owner** – COMPLETE (Stored on SharePoint) * Transition style, structure and template setup process to **[MDA]** Content Developers – COMPLETE * Changes/updates from additional scope to be included as part of transition |
| **MDA Transition Plan** | * **[MDA]** owner to determine business owners/operations support team to transition * Conduct transition sessions to cover activities to be transitioned |

**2 Objectives**

The objective of this plan is to:

1. Have an effective and timely transfer of knowledge from one resource to another
2. Seamless transfer of complete responsibilities from one resource to another
3. Minimise the impact of resource mobility on the project
4. Document information about an application that could help the project work or for a future transition that could take place.

**3 Scope**

The section defines all the applications, related documents and environment for which knowledge transition is required.

**List of applications**

List of all the applications that are to be transitioned or knowledge transferred

|  |  |  |
| --- | --- | --- |
| **Ver.** | **Application name** | **Module name** |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |

**List of application-related documents**

For each application in scope, list of all the application related documents that are available and are to be transitioned are as below. Please duplicate this table as needed for additional applications:

| **No.** | **Document type** | **Status** | **Accuracy** | **Document name** | **Key document** |
| --- | --- | --- | --- | --- | --- |
| 1 | Requirement’s document | Good/ok/none | Up to date, slightly outdated |  | Yes/no |
| 2 | Technical architecture |  |  |  |  |
| 3 | Use cases |  |  |  |  |
| 4 | High-level design – functional design |  |  |  |  |
| 5 | High level design – database design/data models |  |  |  |  |
| 6 | High level design – process flows/models |  |  |  |  |
| 7 | Any existing testing artifacts |  |  |  |  |

**List of process-related documents**

List of all the process documents that are available and are to be transitioned or knowledge transferred.

| **No.** | **Document type** | **Status** | **Accuracy** | **Document name** | **Key document** |
| --- | --- | --- | --- | --- | --- |
| 1 | Project plan | Good/ok/none | Up to date, slightly outdated, outdated |  | Yes |
| 2 | Configuration plan |  |  |  | Yes |
| 3 | SLA document |  |  |  | Yes |
| 4 | Workflow document |  |  |  | Yes |
| 5 | Standards – test |  |  |  | Yes |
| 6 | Checklists – test |  |  |  | Yes |
| 7 | Templates – test |  |  |  | Yes |
| 8 | Test procedure |  |  |  | Yes |
| 9 |  |  |  |  |  |

**Environment**

Introduction to the environment used in the project:

| **No.** | **Item** | **Value/version** | **Remarks** |
| --- | --- | --- | --- |
| 1 | Operating system | Windows NT/2000/XP |  |
| 2 | DBMS |  |  |
| 3 | Third party tools |  |  |
| 4 | Test procedure |  |  |
| 5 |  |  |  |

**4 Knowledge transfer approach**

The knowledge transfer approach would be described in this section, for example: will be carried out using the following approach

The following knowledge transfer approach will be taken to ensure that the knowledge transition will be successfully carried out to the MDA team:

1. Since there will be a larger team, we recommend the lead from the team to travel to the MDA location for 3-4 weeks to do initial knowledge transfer. This knowledge transfer would be related to overall **INSERT** processes, approach, application architecture, key applications, and the integration interfaces etc.
2. Once the project teams are formed, we would have the MDA Technical lead from the team travel to onsite for application specific knowledge transfer. They would be responsible for understanding the project, application, related interfaces etc. and would document the information into a knowledge transfer document. This document will be provided to the MDA team and the designated person from that team would conduct knowledge transfer sessions daily.

Knowledge transfer will be carried out using a variety of methods:

1. Organisational and technical briefings
2. One-to-one and one-to-many training sessions
3. Self-study of documentation
4. Shadowing of existing team members on problem resolution
5. Problem resolution with and without guidance from experienced team members
6. Review of previous problem logs and recent changes/enhancements
7. Knowledge sharing between the existing/new team members.

The transition schedule is defined with the detailed activity as a checklist below:

| **Major Items** | **High level activity** | **Detailed activity** |
| --- | --- | --- |
| Initiate knowledge transfer | Get **INSERT** approval for the knowledge transfer | * Inform INSERT about the need for the knowledge transfer and get a go-ahead |
| Prepare knowledge transfer plan and get **INSERT** approval | * Prepare a draft plan (for involved knowledge transfer’s) or the status report template (For not so involved knowledge transfer’s). In the status report, depict key milestones * Get it reviewed by the **INSERT** and modify it based on the review comments. |
| Consolidate Knowledge Transfer artifacts | * List all the artifacts of the application to be handed over * Place all the latest artifacts into a proper directory structure/Configuration Management tool. |
| Define Scope of Knowledge Transfer | * Identify key entities (Screens, Reports, Batch processes, Databases and interfaces) for detailed Knowledge transfer * Identify key artifacts for detailed knowledge transfer. |
| List all the open issues/cases | * These would potentially have to be addressed by the knowledge transfer recipient. |
| Identify team | * Identify team who will provide the knowledge transfer * Identify team who will receive the knowledge transfer. |
| Provide relevant accesses to the identified team | * E-mail ID * Access to development/stage/production servers to. * Access document artifacts * Run applications (screens, batch jobs, reports, interfaces) * Access database |
| Get signoff on the knowledge transfer plan from the customer | * Before detailed knowledge transfer is started, get **INSERT** signoff on the scope and duration of the Knowledge Transfer |
| Execute knowledge transfer | Introduction to the project | * If new to account-**INSERT**, have account induction session. There is a lot of learning involved in this that is key to know. This is mandatory for all new entrants to the account * Project Objectives and History * Introduce to the team * Introduce to the **INSERT**, if required to interact with the **INSERT** |
| Knowledge transfer of current processes and service level agreements (SLA) | * Provide Knowledge Transfer on: * Current Development/maintenance/support workflow * Current SLA's/commitments |
| Service / Function overview session(s) |  |
| Knowledge transfer of artifacts | * Proposal/Statement of Work (SOW) * Requirements * Design * Demo of the application * Test Plan |
| Knowledge transfer of known issues/ cases /complaints | * Handover the list of known issues/cases/complaints and explain them * Indicate the possible schedule for addressing the issues/cases/complaints |
| Close knowledge transfer | Verify if all the planned activities were performed | * Verify business and basic application knowledge |
| Feedback sessions | * The team/person who received the knowledge transfer should provide feedback as to how the knowledge transfer was conducted. Provide areas for improvements |

**5 Method of measurement**

A variety of methods, both subjective and objective, will be used to assess the success of the knowledge transfer undertaken. These are summarised in the table below:

| **Method** | **Success criteria** | **Metrics/approach** |
| --- | --- | --- |
| Individual’s self-assessment | * The individual is confident that they have achieved the necessary knowledge/skills for support of the service | Ongoing review – metrics   * Outstanding questions from training activity * Consistency with understanding gained to date * Assessment of further training required |
| Review by existing team member | * Evidence that individual has gained understanding required | Ongoing review – metrics   * Quality of questions asked * Ability to carry out training tasks * Accuracy of training notes * Appreciation of business processes * Appreciation of operational processes |
| Review by existing team leader/Service Delivery Manager (SDM) | * Evidence that individual has gained understanding required | * Weekly review of progress – see Section 8 |
| Review by receiving SDM | * Confidence that individual/team have gained the necessary skills/knowledge | * Weekly review of progress – see Section 8 |
| Checklist of topics covered | * Completion of all identified knowledge transfer activities | * Weekly review of progress – see Section 8 * Skills matrix indicating depth of knowledge achieved by area |
| Problem resolution | * Ability to resolve application problems | * Metrics * Numbers/proportion of problems resolved by new team/individual categorised by application and complexity\* * Time taken to resolve problems |
| Documentation update | * Ability to update/create necessary support documentation | * Update and completion of documentation to be reviewed by existing team members for accuracy |

**6 Sign-off of successful completion**

Sign-off of successful completion of knowledge transfer should be obtained from appropriate teams.

This sign-off will form part of the handover status review to be included in the ‘go/no go’ meeting to be held prior to formal transfer of services to another team/ support organisation.

**7 Assumption**

The key assumptions made are:

1. The knowledge being transferred is available within the same team
2. Service level agreements are not to be defined or refined as part of this plan
3. Both the teams (one providing the knowledge transfer and one receiving the knowledge transfer) have sufficient bandwidth for the transition process

**8 Constraints**

***Constraints on the knowledge transfer activity itself:***

1. Not all the support team members will be onsite for knowledge transfer
2. The team that comes onsite will be there for a limited period for face-to-face contact with the existing team
3. A large part of the knowledge transfer activity will involve resources from the existing support team who will, during this period, continue to be required for day-to-day support
4. Elements of the knowledge transfer plan involve MDA Technical staff who will have other responsibilities which may impact on availability for knowledge transfer
5. Knowledge transfer activities are limited to a set time frame.

***Constraints on measurement of success:***

1. Some criteria are necessarily subjective
2. Capability of application problem resolution will largely be based on those that arise during the knowledge transfer period which may well not cover full range of those that could be encountered.