

Powers and knowledge transfer tool

The **Powers and knowledge transfer** tool will help you understand and determine which powers and knowledge you need to transfer, and how to go about it.

The purposes of this tool are to help you to:

- create a list of the different knowledge and powers that you must consider during the reflection on your business transfer;
- identify the individuals who will share their knowledge and powers, taking into account their age, experience and seniority;
- name your successor(s), whether they are family members or managers;
- determine which knowledge your successor(s) must acquire;
- determine the powers that your successor(s) must assume;
- establish a schedule for the powers and knowledge transfer;
- plan the powers and knowledge transfer so as to ensure the continuity of your business;
- do preventive planning for the management of your human resources.

Instructions:

1. Determine the knowledge/skills you feel you must acquire or improve.
2. Under each statement, determine who in your family, or among your employees/other parties would be best placed to manage the knowledge transfer.
3. Think of training activities that could round out this knowledge.
4. If applicable, write down a target date for the completion of the knowledge transfer.
5. The transfer of powers is done in cooperation with the current owners. Determine which powers will be transferred and exactly which tasks will be assumed, and set a target date.

Powers and knowledge transfer

KNOWLEDGE TRANSFER PLAN FROM:

KNOWLEDGE Identify the stakeholders	SCHEDULE Target date for completing the activity
<p>Operations</p> <p>Name: _____</p> <p>Age: _____</p> <p>Seniority: _____</p> <p>Expected retirement date: _____</p> <p>Key information to be transferred: _____</p> <p>_____</p> <p>Successor: _____</p>	
<p>Competitors</p> <p>Name: _____</p> <p>Age: _____</p> <p>Seniority: _____</p> <p>Expected retirement date: _____</p> <p>Key information to be transferred: _____</p> <p>_____</p> <p>Successor: _____</p>	
<p>Suppliers</p> <p>Name: _____</p> <p>Age: _____</p> <p>Seniority: _____</p> <p>Expected retirement date: _____</p> <p>Key information to be transferred: _____</p> <p>_____</p> <p>Successor: _____</p>	
<p>Financial backers</p> <p>Name: _____</p> <p>Age: _____</p> <p>Seniority: _____</p> <p>Expected retirement date: _____</p> <p>Key information to be transferred: _____</p> <p>_____</p> <p>Successor: _____</p>	

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KNOWLEDGE TRANSFER PLAN FROM:

KNOWLEDGE Identify the stakeholders	SCHEDULE Target date for completing the activity
<p>Clients</p> <p>Name: _____</p> <p>Age: _____</p> <p>Seniority: _____</p> <p>Expected retirement date: _____</p> <p>Key information to be transferred: _____</p> <p>_____</p> <p>Successor: _____</p>	
<p>Technologies</p> <p>Name: _____</p> <p>Age: _____</p> <p>Seniority: _____</p> <p>Expected retirement date: _____</p> <p>Key information to be transferred: _____</p> <p>_____</p> <p>Successor: _____</p>	
<p>Staff</p> <p>Name: _____</p> <p>Age: _____</p> <p>Seniority: _____</p> <p>Expected retirement date: _____</p> <p>Key information to be transferred: _____</p> <p>_____</p> <p>Successor: _____</p>	
<p>Other</p> <p>Name: _____</p> <p>Age: _____</p> <p>Seniority: _____</p> <p>Expected retirement date: _____</p> <p>Key information to be transferred: _____</p> <p>_____</p> <p>Successor: _____</p>	

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POWERS TRANSFER PLAN TO:

POWERS Identify the persons best placed to transfer the respective powers	SCHEDULE Target date for completing the activity
Administrative Name: _____ Age: _____ Seniority: _____ Expected retirement date: _____ Powers to be transferred: _____ _____ Successor: _____	
Executive Name: _____ Age: _____ Seniority: _____ Expected retirement date: _____ Powers to be transferred: _____ _____ Successor: _____	
Operational Name: _____ Age: _____ Seniority: _____ Expected retirement date: _____ Powers to be transferred: _____ _____ Successor: _____	
Production Name: _____ Age: _____ Seniority: _____ Expected retirement date: _____ Powers to be transferred: _____ _____ Successor: _____	

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POWERS TRANSFER PLAN TO:

POWERS Identify the persons best placed to transfer the respective powers	SCHEDULE Target date for completing the activity
Distribution Name: _____ Age: _____ Seniority: _____ Expected retirement date: _____ Powers to be transferred: _____ _____ Successor: _____	
Design Name: _____ Age: _____ Seniority: _____ Expected retirement date: _____ Powers to be transferred: _____ _____ Successor: _____	
Management Name: _____ Age: _____ Seniority: _____ Expected retirement date: _____ Powers to be transferred: _____ _____ Successor: _____	
Other Name: _____ Age: _____ Seniority: _____ Expected retirement date: _____ Powers to be transferred: _____ _____ Successor: _____	