**WORK TRANSITION PLAN**

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| --- | --- | --- |
| **Prepared by:** | **Role:** | **Manager Name:** |
| **Prepared for:** | **Last Date of Employment:**  |  |
|  |
| Responsibilities and duties: |
| **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 |
|  |
| Projects: |
| Due Date:  | [Date] |
| Milestones: | [Milestones] |
| Contacts: | This is a list of the main contacts who you’ll work with.* Name, job title, email address
* Name, job title, email address
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| Process Steps: | 1. Instructions begin for step 1.
2. Next step and result.
3. Continue with step and show screen shots as appropriate.
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| Files: | [Provide Link here] |
|  |
| Standard Assignments: |
| Daily | Weekly | Monthly | Annually |
| * Attend meetings.

Send out status communications | * Submit news stories
 | * Validate the monthly dashboard.
 | * Complete required training by end of year
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