**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 | | | | | | |
| Process Steps: | 1. Instructions begin for step 1. 2. Next step and result. 3. Continue with step and show screen shots as appropriate. | | | | | | |
| 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 |