

# Remote Knowledge Transfer Template

## Employee Information:

- Name:
- Role:
- Location & Time Zone:
- Last Working Day:
- Overlap Hours with Team:

## Critical Knowledge Areas:

1. [What they need to know]
2. [Priority: High/Medium/Low]
3. [Can this be learned async or needs sync time?]

## Key Processes (Async-Friendly):

- [Step-by-step workflows with screenshots]
- [Why it's done this way (context)]
- [Common mistakes and how to avoid them]
- [What to do when stuck (and who to ask in which time zone)]

## Tools & Access:

- [Software platforms with direct login links]
- [Where credentials are stored]
- [Configuration guides]
- [Troubleshooting tips]

## Key Contacts & Communication:

- [Internal stakeholders: Name, Role, Location, Time Zone, Best Contact Method]
- [External vendors/clients with availability windows]
- [Escalation paths for urgent issues]
- [Who's the backup when primary contact isn't online]

## Documentation Location:

- [Direct links to folders/pages]
- [File naming conventions]
- [How to navigate the knowledge base]

- [Where different types of info live]

**Async Resources:**

- [Link to recorded walkthroughs]
- [Video tutorials]
- [Written SOPs]
- [FAQ document]

**Meeting Schedule & Rituals:**

- [Recurring meetings with time zones]
- [Team norms and communication expectations]
- [Response time standards]
- [Handoff protocols between time zones]

**Lessons Learned:**

- [What worked well]
- [What to avoid]
- [Tribal knowledge not written elsewhere]
- [Cultural context for remote collaboration]

**Questions New Person Will Have:**

- [Anticipate questions they can't ask immediately]
- [Provide answers up front]