

Knowledge Management and Transfer (Cross-Training) – Worksheet

For tasks and activities (not entire roles) that need to be captured and cross-trained for continuity of operations.

Critical To	<p>1.) Capturing knowledge that otherwise would exit with the employee and missing, could impede business operations</p> <p>2.) Continuity of business operations during expected/unexpected absences and vacancies: FMLA, Succession, Turnover, Promotion, etc.</p> <p>3.) Onboarding and training new hires more efficiently and effectively through documented processes</p>								
Area	Date	Division or College					Manager		
	Employee			Position					
Instructions	<p>Complete this worksheet with the employee to rank activities in order of importance and designate people for cross training.</p> <ul style="list-style-type: none"> • What core activities do you do at work? Each process name should have a verb (action word). Each process should relate to only one delegable job role. <ul style="list-style-type: none"> ○ Examples: conduct performance reviews, conduct interviews, perform monthly reports, reconcile weekly finance statements, schedule all class schedules, reserve all rooms, facilitate a conference, enter all payments, etc. • Rank each activity in order of critical business operation importance and supply the amount of time you spend on this task each week. 								
Rank and Note Each Core Work Activity	Rank	Core Work Activity	Est. Hours Spent Weekly on Activity	Primary	Backup 1 Name & Deadline	Backup 2 Name & Deadline	Assigned Trainer	Process Documented (Y/N) & Deadline	Assigned to Document
	1								
	2								
	3								
	4								
	5								
	6								
	7								
	8								
	9								
	10								

Core Work Activity / Business Process - Documentation Guidelines

Purpose: When designating an activity as a critical business operation process and assigning it for cross training, create a business process document to define/outline all aspects of this activity for successful training and to capture as part of your knowledge management strategy. Below is just a sample of the things necessary to document a process for effective sharing of activity knowledge.

Activity/Business Process	Purpose of the Activity and the Scope of work. What is the intention/objective of the process (why do it?) and when and where does it apply?
Roles	Roles of all involved in process and their functions to ensure role clarity
Contacts	External contact information – special phone numbers, email addresses for the customer/client/end-user. (ex. special 800# or ext.?) Internal contact information - for those involved in the process.
Definitions & Acronyms	Consistent operational definitions; acronyms should be defined to ensure proper interpretation
Process Flow	<ul style="list-style-type: none"> ▪ Standards & Guidelines (any standards, policies, rules governing this process) ▪ Process (show a flowchart where necessary) ▪ Procedures (step 1, step 2, step 3) Consider that many people who perform the same activity, may go about it a different way. Agree on a common process for training, assisting others and reduction of errors. <ul style="list-style-type: none"> • Entry Criteria: what is required before this process can begin - time, an event, receipt, etc. • Input Actions: by owner and all involved parties that have a role in this process • Output: What deliverables or other output are required of this process and how should they be formatted/delivered? • Metrics: Where are measurements captured or automatically entered? • Exit Criteria: What is the condition required before the process is declared complete - filed, saved, sent to someone else, etc.?
Tools	<ul style="list-style-type: none"> ▪ Templates (any standardized templates, forms, web links, etc. that will need to be shared to perform this process) ▪ Checklists (any checklists that will need to be shared to perform this process) ▪ Training (any specialized training, skills or certifications necessary to perform this process) ▪ Equipment/Software necessary to those performing this activity/process
Approvals/Verifications	Who needs to review, approve or verify this data to consider it completed? Is there a checklist to fill out or an approval form? Is this process monitored or audited, and filed a certain way or sent to others?
Deadlines	What is the start to finish timeframe of this process? It is due daily, weekly, monthly or annually?