

ROLE TRANSITION CHECKLISTS

ACTIVITY TYPE	OVERSEEN BY	
TRANSITION ADMINISTRATION	NEW SUPERVISOR	
ACTIVITY DESCRIPTION	COMPLETION DATE	COMMENTS
Discussion between successor and new manager of new position, accountabilities, and expectations		
Training requirements for new position discussed and executed or in progress		
Effective date and probation period established and agreed upon by successor for new position		
Finalized support role of incumbent over course of transition period - <i>if applicable</i>		
Exit interview of incumbent scheduled / conducted - <i>if applicable</i>		
Notified Human Resources of pending position changes		
Notified direct reports and staff of position change		
Notified IT/Facilities of pending location and access changes		

ACTIVITY TYPE	OVERSEEN BY	
CURRENT ROLE HAND-OFF	CURRENT SUPERVISOR	
ACTIVITY DESCRIPTION	COMPLETION DATE	COMMENTS
Provided relevant business issues information		
Provided projects, initiatives, and tasks information		
Provided direct reports information		
Provided location of pertinent documents and records		
Provided lists of pertinent contacts		
Notified current colleagues of role change		
Notified current clients / customers		
Notified external contacts / vendors / suppliers, etc.		
Exchange / reset processed of relevant system IDs and passwords		
Current supervisor to conduct final employee performance review		

ACTIVITY TYPE	OVERSEEN BY	
SUCCESSOR NEW ROLE ORIENTATION	NEW SUPERVISOR	
ACTIVITY DESCRIPTION	COMPLETION DATE	COMMENTS
Human Resource / Payroll systems changes activated		
Physical relocation carried out - <i>if applicable</i>		
Provided relevant business issues information		
Provided projects, initiatives, and tasks information		
Provided direct reports information		
Provided location of pertinent documents and records		
Provided lists of pertinent contacts		
Notified current colleagues of role change		
Notified current clients / customers		
Notified external contacts / vendors / suppliers, etc.		
Exchange / reset processed of relevant system IDs and passwords		
New team introductions / meetings carried out		
New supervisor to conduct probation period review		

TRANSITION PLAN AGREEMENT

INCUMBENT SIGNATURE

DATE

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INCUMBENT SIGNATURE

DATE

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INCUMBENT SIGNATURE

DATE

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