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What your employee transition plan template should look like

Just as with many things, timing is crucial. You need to roll out your plan the minute you know the employee is about to leave or has departed—in many cases, the quicker the better. The plan should have at least four parts:

1. **Core duties and responsibilities:** These are the duties and responsibilities that have a direct impact on the company's processes—the company would be left in the lurch if they were incomplete. In some cases, existing employees can handle some of these tasks, but you need a dedicated person to juggle them all.
2. **Project statuses:** This includes a detailed list of all projects that are in progress, their status, how to access associated files and the next steps needed to bring them to fruition. In many cases, the major projects may require separate documents and details.
3. **Standalone outstanding deadlines:** These are projects that may not be associated with a deadline and can include regular tasks such as responding to a particular vendor or customer.
4. **Key contacts:** To make things flow more smoothly, the new person needs to know who to contact, when and why. This is the list that makes certain parts of the job easier to maneuver.

Ideally, the employee and employer or supervisor work together to create a checklist with basic transition plan details, such as the necessary knowledge base, transition plan agreement and resources. With this plan, employees get to see just how their work impacts the company, creating a sense of professional pride.

Transition plan template

Companies that are prepared for the unexpected will have several contingency plans in place. They know how to communicate with their teams clearly and concisely and create an understandable plan. Here is an example of what the template looks like:

Dear [supervisor name],



[Company Logo Delete or Replace]

Here is the transition plan for my current position **[title]** that lays out my core responsibilities, project statuses, stand-alone projects and key contacts. All related documents are located in **[file path]**. As discussed, my last day is **[date]**, so if there are any questions, please let me know.

All the best,

[employee name]

Core duties and responsibilities

Daily:

Weekly:

Monthly:

Quarterly:

Annually:

Project outstanding

Project name:

Description:

Status:

Team roster:

Relevant deadlines/milestones:

Project files:

Upcoming deadlines

Date:

Description:



[Company Logo Delete or Replace]

Instructions:

Key contacts

Name:

Title:

Organization:

Description of collaboration:

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