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COURSE BROCHURE

# Advanced Knowledge Transfer and Expertise Succession Course

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Vienna

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Registered in the United Kingdom and Saudi Arabia

# Advanced Knowledge Transfer and Expertise Succession Course

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Knowledge Transfer and Expertise Succession is a 2-week training course for succession planners, HR directors and line managers of critical roles, who build a Critical Role Transfer Plan covering their most exposed positions. Organisations often name successors on paper yet leave them without the judgement, relationships and context the incumbent holds, so the first months after a departure become costly. Jupiter Prime Training runs this course to close that gap.

## Why Knowledge Transfer and Expertise Succession Matters Now

Three pressures make the subject urgent: faster turnover and internal mobility that shorten tenure in critical roles, thinner management layers that leave fewer natural deputies, and boards asking for evidence that succession plans would actually work. An organisation that pairs succession with deliberate knowledge transfer appoints successors who perform quickly and keep client and partner relationships intact; one that does not faces long ramp-up periods, lost accounts and repeated mistakes. The course draws on ISO 30401 Knowledge Management Systems Requirements alongside established succession practice such as readiness ratings, successor pools and talent review grids.

## Who Gains Most from Knowledge Transfer and Expertise Succession

- Succession planners accountable for successor pools and bench strength in critical roles
- HR directors who approve transfer resourcing, overlaps and backfill
- Line managers responsible for preparing successors and releasing expert time
- Talent and leadership development heads who design mentoring and rotations
- Business unit heads whose client or asset continuity depends on a few individuals

Organisations gain most when an HR director, a succession planner and a line manager of a critical role attend together, because each transfer needs all three to commit time and authority.

## Knowledge Transfer and Expertise Succession Capabilities

Participants leave able to turn a succession chart into transfers that actually move judgement, relationships and decision rights to named successors.

- Assess role criticality and departure risk — executive committees prioritising succession effort
- Specify readiness ratings and gap profiles — successors and their managers
- Weigh mentoring, paired working and rotations against knowledge type — transfer method decisions
- Design knowledge transfer plans with milestones and backfill — HR approvers and line managers
- Build transfer progress scorecards — leaders overseeing many critical roles

- Test handover acceptance criteria — sign-off that a successor is ready

## Key Knowledge Transfer and Expertise Succession Terms

- Knowledge-critical role — A position whose holder carries know-how, relationships or decision rights that would be hard and slow to replace.
- Readiness rating — A judgement of when a successor could take over a role, such as ready now or within one to two years.
- Bench strength — The number and readiness of successors available for a role or group of critical roles.
- Knowledge transfer plan — A schedule of items to transfer, methods, owners and milestones agreed between an expert, a successor and their manager.
- Paired working — An arrangement in which successor and incumbent share live tasks, with decision rights passing gradually to the successor.
- Handover acceptance criteria — Agreed evidence that confirms a transfer is complete and the successor can operate without the incumbent.

## Knowledge Transfer and Expertise Succession Day by Day

### Day 1: Succession Meets Knowledge

- Departure Triggers Across the Workforce — Retirement, Promotion, Resignation and Redeployment
- Succession Planning Versus Knowledge Transfer — Where Each Falls Short Alone
- ISO 30401 Knowledge Management System Links — Succession Within the Wider System
- Cost of Vacancy and Ramp-Up Time — Case for Early Transfer
- Sponsor and Line Manager Roles — Ownership of Each Transfer

### Day 2: Identifying Knowledge-Critical Roles

- Role Criticality Scoring — Impact, Scarcity and Time to Competence
- Knowledge Content Profiles per Role — Know-How, Relationships and Context
- Departure Risk Signals — Age Profile, Engagement and Market Demand
- Critical Role Register — Visibility for the Executive Committee
- Talent Review Grid Integration — Linking Performance With Knowledge Risk

### Day 3: Successor Identification and Readiness

- Successor Pools and Bench Strength — Coverage of Critical Roles
- Readiness Ratings — Ready Now, Near Term or Longer Horizon
- Readiness Gap Profiles — Skills, Relationships and Judgement Missing
- Internal Versus External Successor Choices — Speed and Culture Fit
- Successor Development Agreements — Commitments of Successor and Manager

## Day 4: Selecting Transfer Methods

- Transfer Method Selection Matrix — Matching Knowledge Type to Method
- Mentoring Relationships — Long-Horizon Judgement and Network Transfer
- Job Overlap Arrangements — Live Exposure to Real Decisions
- Guided Rotations and Stretch Assignments — Breadth Before Appointment
- Documented Procedures and Playbooks — Explicit Content Ready for Reuse

## Day 5: Mentoring for Expertise Succession

- Mentoring Contract Design — Goals, Cadence and Boundaries
- Mentor Selection and Preparation — Willingness and Coaching Skill
- Reverse and Group Mentoring Options — Two-Way Knowledge Flow
- Mentoring Conversation Guides — Structured Sessions on Hard Cases
- Mentoring Health Checks — Early Signs of Stalled Relationships

## Day 6: Paired Working and Handover Design

- Paired Working Rotas — Sequencing From Observe to Lead
- Delegation Ladders — Progressive Hand-Off of Decision Rights
- Relationship Transfer Through Stakeholder Introductions — Client and Partner Continuity
- Handover Packs for Critical Roles — Open Commitments and Context
- Exit Timing Negotiation — Overlap Periods Agreed With Leavers

## Day 7: Knowledge Transfer Plans

- Knowledge Transfer Plan Template — Items, Methods, Owners and Milestones
- Transfer Item Prioritisation — Most Critical Know-How First
- Time Release and Backfill Arrangements — Capacity for Expert and Successor
- Transfer Plan Approval Routes — Line Manager and HR Sign-Off
- Plan Contingencies — Sudden Departures and Long Absences

## Day 8: Tracking Transfer Progress

- Transfer Progress Scorecards — Items Completed Against Milestones
- Successor Competence Evidence — Observed Tasks and Sign-Offs
- Escalation Rules for Slipping Transfers — Intervention Triggers
- Portfolio View Across Critical Roles — Executive Reporting Choices
- Expert and Successor Feedback Loops — Method Adjustments Mid-Transfer

## Day 9: Validating the Handover

- Handover Acceptance Criteria — Definition of a Completed Transfer
- Successor Readiness Assessment Panels — Independent Confirmation of Readiness
- On-Call Period After Departure — Expert Availability Arrangements
- Post-Handover Performance Monitoring — Early Error and Delay Signals
- Lessons From Each Succession — Improving the Next Transfer

## Day 10: Practising the Critical Role Transfer Plan

- Critical Role Register and Successor Pools — Priority Transfers Confirmed
- Method Matrix Applied per Role — Mentoring, Pairing and Rotation Mix
- Scorecard and Acceptance Criteria Alignment — Progress and Completion Measures
- Time Release and Backfill Commitments — Resourcing Agreed With Sponsors
- Critical Role Transfer Plan — Final Presentation to Leadership

## Applying Knowledge Transfer and Expertise Succession After the Course

- Score the critical roles in one division for criticality and departure risk, then publish a critical role register with readiness ratings for each successor.
- Agree a knowledge transfer plan for one departing expert, combining mentoring, paired working and a handover pack with clear acceptance criteria.

## Knowledge Transfer and Expertise Succession Questions FAQ

### What is knowledge transfer and expertise succession, and why does it matter now?

It is the practice of moving the know-how, relationships and decision rights of critical roles to prepared successors. It matters now because faster turnover and thinner management layers leave successors named but unready when key people leave.

### Which roles gain most from knowledge transfer and expertise succession?

Succession planners, HR directors and line managers of critical roles gain most. Leadership development heads and business unit leaders in banking, energy, healthcare and engineering also benefit, because their continuity rests on a few experienced people.

### How does knowledge transfer and expertise succession differ from a standard succession planning course?

It goes beyond naming successors to moving expertise into them. Standard succession courses build talent pools and grids; this one adds transfer method selection, transfer plans, progress scorecards and handover acceptance so successors can actually perform.

### What will you bring back from knowledge transfer and expertise succession?

You bring back a transfer plan for your critical roles, with successors, readiness gaps, methods, resourcing and acceptance criteria. It also includes scorecards you can use to report progress to leadership.

## Knowledge Transfer and Expertise Succession: The Way Forward

The Critical Role Transfer Plan first informs which roles receive transfer resources and which successors are paired with experts now. HR directors, succession planners and line managers use it to release time, approve backfill and track progress. After the first handovers, revisit the acceptance criteria and method matrix, since real successor performance shows which methods deserve more weight.