

Job Transition Checklist

Look over your calendar, work files, and email correspondence. These should prompt you to recall key elements of your current job. Divide tasks into 1) ongoing (routine) work, and 2) outstanding (special) projects. Then organize pertinent information for someone else to complete each task, as follows.

Part 1: Ongoing Work

Daily Tasks

- EXAMPLE: Compile and circulate daily spending reports for Projects X, Y, and Z.
 - Instructions to obtain and analyze data are saved here: (LINK TO FILE)
 - Template for report is saved here: (LINK TO FILE)
 - Archive of all prior reports is here: (LINK TO FILE)

Weekly Tasks

- EXAMPLE: Check inventory and communicate parts status to key vendors.
 - List of vendor contacts is saved here: (LINK TO FILE)
 - Instructions to obtain and analyze data are saved here: (LINK TO FILE)
 - Archive of vendor communication is here: (LINK TO FILE)

Monthly Tasks

- EXAMPLE: Pull customer service evaluations for the month and report each branch's outcomes.
 - Instructions to obtain and analyze data are saved here: (LINK TO FILE)
 - Template for report is saved here: (LINK TO FILE)
 - Archive of all prior reports is here: (LINK TO FILE)

Do the same for tasks completed quarterly and annually.

Part 2: Outstanding Projects

For each project, create a document with:

1-Name of project

2-Description of project

What it is

Why it is important

How project success is evaluated

3-Your role on project (if there is a project team, include contact information and brief description of the roles of all team members)

4-Current status of project and links to relevant files

5-Deadline(s)