WORKBOOK

Securing Knowledge Before It Retires

All the templates and checklists from the playbook, to print and fill in

Acht S · INTERVIEWER · CAMPUS

These worksheets belong to the playbook “Securing Knowledge Before It Retires”. It tells you when you need them and how to use them. Start with the overall checklist: it shows the whole way and tells you which worksheet is due when.

help.8s.de/playbooks/wissenssicherung/

Contents

Overall checklist 3

Self-tests 4

Knowledge map 6

Backward plan 7

Conversation guide for the first conversation 8

Tandem plan 9

Interview plan 10

Handover checklist 11

Gap list 12

Handover list 13

One-page report 14

© 2026 Acht S GmbH · All rights reserved

WORKSHEET

Overall checklist

What it is for: The whole path on one page
From chapter 8: At a glance

	STEP	WHAT YOU DO	CHAPTER
☐	**Recognise**	Check the warning signs, determine the urgency for each person.	1
☐	**Goal**	Define what the successor can solve alone after the farewell.	2
☐	**Map**	Collect topics and rate them by form, frequency and risk.	2
☐	**Backward plan**	Count back from the last working day, subtract remaining leave.	2
☐	**Ground rules**	Talk to the person, clarify data protection, works council and credit.	2
☐	**Tandem**	Name the successor, assign roles and permissions, free up time.	3
☐	**Template**	Choose a template in INTERVIEWER, adapt it and duplicate it for your topics.	4
☐	**Interviews**	Two conversations a week, rare and expensive topics first, have every iDoc checked.	4
☐	**Learning content**	Turn iDocs into short content in CAMPUS, approve it and make it visible to the successor.	5
☐	**Tandem stages**	Watching, doing it yourself, working alone.	5
☐	**Farewell**	Tick off the handover checklist, honour the person's contribution.	5
☐	**Afterwards**	Keep the gap list, maintain the content, plan for the next person.	6
☐	**Report**	Report on one page on the last day, after three and after twelve months.	7

WORKSHEET

Self-tests

What it is for: Is knowledge at risk, and for whom is it urgent?
From chapter 1: Recognise and decide

Five warning signs

In the next three years someone will retire whose tasks nobody can fully cover.

☐ Yes ☐ No

For some questions there is exactly one person who knows the answer.

☐ Yes ☐ No

Exceptions and special cases are written down nowhere; people simply ask.

☐ Yes ☐ No

Important contacts with customers or partners depend on one person.

☐ Yes ☐ No

There is no fixed point in time at which a handover begins.

☐ Yes ☐ No

Count how often you said "Yes".

0 to 1 Yes: Well prepared. Keep an eye on the statements, especially during the annual staff planning.

2 to 3 Yes: Time for a plan. Nothing is pressing yet, but when it is, there will be no time. Take the second test.

4 to 5 Yes: Act now. Take the second test and start with the person for whom it is most urgent. And if you like, talk to us.

How urgent is it?

1 · How much time is left until the last working day, once you subtract the remaining leave?

☐ More than 24 months (0) ☐ 12 to 24 months (1) ☐ 6 to 12 months (2)
☐ Fewer than 6 months (3)

2 · How unique is the knowledge?

☐ Is largely written down somewhere (0) ☐ Partly held by others (1)
☐ Almost only with this person (2)

Add up the points from both questions.

0 to 1 points: Monitor. Put the person on the handover list in Chapter 6 and plan the handover at the latest 18 months before the last day.

2 to 3 points: Plan. Create the knowledge map and the backward plan in Chapter 2 now. The interviews can follow at a calmer pace.

4 points: Start now. Map this week, first interview this month, name the successor as early as possible.

5 points: Emergency mode. Give up on completeness. Choose the three topics that would be the most expensive, run the interviews on them immediately and have the successor at the table from the first conversation.

WORKSHEET

Knowledge map

What it is for: All topics of one person, rated by form, frequency and risk
From chapter 2: Plan the handover

One topic per row. The map is the basis for the interview plan in Chapter 4.

TOPIC	FORM	HOW OFTEN?	COSTLY IF WRONG?	WRITTEN DOWN SOMEWHERE?
	Procedure · Exception · Relationship · Reason	often · sometimes · rarely	Yes · No	Yes · partly · No
	Procedure · Exception · Relationship · Reason	often · sometimes · rarely	Yes · No	Yes · partly · No
	Procedure · Exception · Relationship · Reason	often · sometimes · rarely	Yes · No	Yes · partly · No
	Procedure · Exception · Relationship · Reason	often · sometimes · rarely	Yes · No	Yes · partly · No
	Procedure · Exception · Relationship · Reason	often · sometimes · rarely	Yes · No	Yes · partly · No
	Procedure · Exception · Relationship · Reason	often · sometimes · rarely	Yes · No	Yes · partly · No
	Procedure · Exception · Relationship · Reason	often · sometimes · rarely	Yes · No	Yes · partly · No
	Procedure · Exception · Relationship · Reason	often · sometimes · rarely	Yes · No	Yes · partly · No
	Procedure · Exception · Relationship · Reason	often · sometimes · rarely	Yes · No	Yes · partly · No
	Procedure · Exception · Relationship · Reason	often · sometimes · rarely	Yes · No	Yes · partly · No

WORKSHEET

Backward plan

What it is for: When each phase must begin at the latest
From chapter 2: Plan the handover

Last day according to contract _____ **Remaining leave and overtime in working days** _____

PHASE	DURATION (GUIDELINE)	BEGIN AT THE LATEST
Conversation with the person and knowledge map	2 weeks	
Interview series with INTERVIEWER, the last four weeks in parallel with tandem stage 1	12 weeks	
Tandem stage 1: Watching	4 weeks	
Tandem stage 2: Doing it yourself	6 weeks	
Tandem stage 3: Alone	at least 4 weeks	
Buffer and farewell	2 weeks	

First subtract the remaining leave from the last day, then count back row by row from bottom to top. In the online version the plan calculates for you.

WORKSHEET

Conversation guide for the first conversation

What it is for: Winning the person over before planning
From chapter 3: Team and roles

The manager holds the first conversation, in private and with no project plan on the table. Note down your own words beforehand.

This is how I begin, for example:
“What you have built should carry on.”

I ask: What matters to you so that your work carries on?

I ask: Who do you think should take over?

I ask: Should your name appear under the content?

I offer: time, relief, a say

I leave out: pressure, ready-made plans and the sentence “We have to secure your knowledge”

What we agreed, with the next date

WORKSHEET

Tandem plan

What it is for: Who gives, who takes, who helps, with time and permissions
From chapter 3: Team and roles

ROLE	NAME	TIME PER WEEK	RIGHT IN CAMPUS	IN INTERVIEWER
Knowledge holder			User	is interviewed
Successor			User, later Editor	listens
Interview lead			Editor	Owner or member
Approval			Reviewer	–
Line manager			no special rights	–

WORKSHEET

Interview plan

What it is for: Topics, opening questions and dates of the interview series
From chapter 4: Draw out the knowledge

You take the topics from the knowledge map, sorted by urgency: rare and expensive ones first.

NO.	TOPIC	OPENING QUESTION	DATE	CHECKED?
				Yes · No
				Yes · No
				Yes · No
				Yes · No
				Yes · No
				Yes · No
				Yes · No
				Yes · No
				Yes · No
				Yes · No

WORKSHEET

Handover checklist

What it is for: What must be done before the last day
From chapter 5: Handover and onboarding

	CHECK ITEM	DONE ON
☐	All iDocs on the knowledge map have been checked.	
☐	The most important learning content is published in CAMPUS and visible to the successor.	
☐	The successor has completed stage 3 of the tandem.	
☐	Contacts with customers and partners have been handed over in person, not just by email.	
☐	Access, mailboxes and cover arrangements are settled.	
☐	It is settled with HR whether and how the person may be reachable after the farewell.	
☐	Looking after the content has a new person responsible.	
☐	The farewell is planned and the person's contribution is visibly honoured.	

WORKSHEET

Gap list

What it is for: Questions that were open after the farewell
From chapter 6: After the farewell

DATE	QUESTION THAT WAS OPEN	HOW WAS IT SOLVED?	NEW CONTENT NEEDED?
			Yes · No
			Yes · No
			Yes · No
			Yes · No
			Yes · No
			Yes · No
			Yes · No
			Yes · No
			Yes · No
			Yes · No

WORKSHEET

Handover list

What it is for: Who leaves next and whether a plan is in place
From chapter 6: After the farewell

Update once a year. The list shows at a glance who still has no plan.

NAME	AREA	LAST DAY	URGENCY	PLAN?	SUCCESSOR
			Monitor · Plan · Start · Emergency	Yes · No	
			Monitor · Plan · Start · Emergency	Yes · No	
			Monitor · Plan · Start · Emergency	Yes · No	
			Monitor · Plan · Start · Emergency	Yes · No	
			Monitor · Plan · Start · Emergency	Yes · No	
			Monitor · Plan · Start · Emergency	Yes · No	
			Monitor · Plan · Start · Emergency	Yes · No	
			Monitor · Plan · Start · Emergency	Yes · No	
			Monitor · Plan · Start · Emergency	Yes · No	
			Monitor · Plan · Start · Emergency	Yes · No	

WORKSHEET

One-page report

What it is for: The report to senior management
From chapter 7: Measure and report success

Starting point: Who left, what knowledge was at stake?

Coverage: How many topics are secured?

Impact: What can the successor do alone today?

Effort: How many hours did the team invest?

Next step: Who is next?