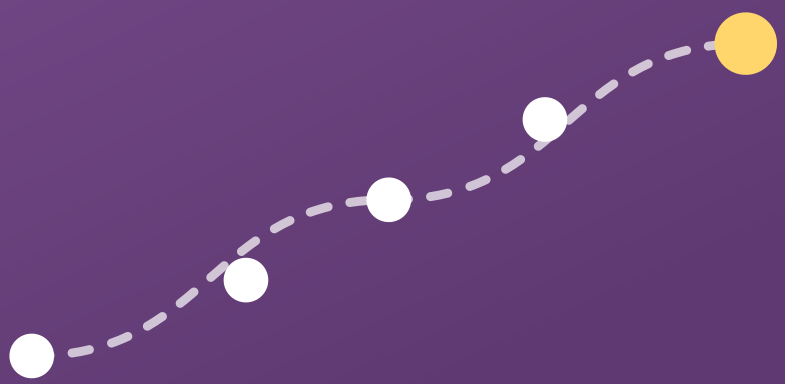
PLAYBOOK

Securing Knowledge Before It Retires

With INTERVIEWER and CAMPUS: from the retirement date to the first year afterwards



Acht S · INTERVIEWER · CAMPUS

WHAT THIS IS ABOUT

No farewell without a handover.

When someone retires after decades, more than a worker leaves. Out goes the knowledge of why things run the way they do, how each customer ticks and what to do when nothing goes to plan. This playbook shows you how to secure that knowledge in time: how to see where it is urgent, how to plan the handover, how to draw knowledge out of someone's head in conversation and how your successor works with it, even when nobody can be phoned any more.

You will be accompanied by Hans from the fictional company Butterfly Effect. Hans has been in customer service for 23 years and has one year left until retirement. Mara, Jonas and Selin help make sure his knowledge stays when he goes.

After reading, you will know

- ✓ how to recognise whose knowledge needs securing and how urgently
- ✓ how to plan a handover backwards from the last working day and draw the knowledge out in conversation
- ✓ how your successor is brought up to speed and how you can tell that it worked

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PREPARATION

Before you begin

What this playbook is, why the deadline changes everything and where you can start in ten minutes.

What this playbook is

A roadmap for one particular moment: an experienced person will retire in the foreseeable future, and with them knowledge that is written down nowhere is at risk of leaving. The playbook takes you from the first shock to the day your successor answers a difficult question without reaching for the phone.

It is not a manual for INTERVIEWER or CAMPUS. Where you want to know how something works in the software, it points you to the manual. You can recognise these references by small book icons, for example INTERVIEWER Securing one person's knowledge.

And it is not a substitute for the playbook Playbook Building a Knowledge Platform. If you do not have a platform yet, read both: this one tells you what has to go in, the other how the place where it is kept should look.

Why the deadline changes everything

Most knowledge projects have no fixed end point. This one does. The last working day is fixed, and it usually comes sooner than expected, because remaining leave and overtime come before it. Three things follow:

- **Order beats completeness.** You will not secure everything. So you secure first what happens rarely and becomes expensive when it goes wrong.
- **Conversation beats writing.** Nobody writes down thirty years of experience in three weeks. Telling is faster, and with INTERVIEWER it still becomes a document.
- **The person beats the method.** A handover only works if the person who is leaving wants to take part. That is a matter of appreciation, not of technology.

AT BUTTERFLY EFFECT · *One more year*

Mara had known for months that Hans would retire. After all, she had thought of him herself when she read the first self-test. But “in a year” had been a phrase back then, not a date.

Now the date was on her desk, in a short email from HR: last working day at the end of March. Underneath, almost in passing: “Remaining leave: 24 days.”

Mara did the sums. Then she did them again. A year had become ten months, and in none of those would Hans do a single day less customer service than before. The interview on complaints that Jonas was so proud of had been a start. Nothing more.

Your ten-minute start

YOUR SITUATION	START HERE
You suspect there is a problem but do not know how big.	Chapter 1
The retirement date is fixed and you need a plan.	Chapter 2
The plan is ready, but the person is resisting.	Chapter 3
You want to start the interviews right away.	Chapter 4
There are fewer than six months left.	Chapter 1, emergency mode, then Chapter 4
The person has already left.	Chapter 6

YOUR SITUATION	START HERE
It is not about retirement but about parental leave, a move or a resignation.	Chapter 6, When it is not retirement

WHAT YOU TAKE AWAY

- The deadline is shorter than it looks. Count remaining leave and overtime in straight away.
- You do not secure everything. You secure the right things first.
- Without the person who is leaving, nothing works. With them, almost everything does.

1

DECIDE

Recognise and decide

Two short self-tests: is your team at risk of losing knowledge to retirement? And how urgent is it?

Five warning signs

Loss of knowledge through retirement announces itself long in advance, and is still almost always noticed too late. Read the five statements and say honestly whether they apply to your team.

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.

AT BUTTERFLY EFFECT · *Who else knows that besides Hans?*

Mara read the five statements aloud at the team meeting on Tuesday. After the second one she added a question: “What happens when a regular customer wants a credit note above the goodwill limit?”

Everyone looked at Hans. Hans looked out of the window.

“And when Hans isn’t there?” Silence. Jonas cleared his throat. “Well, we do have the complaints interview.” Mara nodded. “One topic. How many does Hans have?”

Nobody could answer the question. Not even Hans. Five times yes.

How urgent is it?

The second test takes one minute and is done separately for each person. It combines two questions: how much time is left? And how unique is the knowledge?

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.

What INTERVIEWER and CAMPUS contribute

CHALLENGE	HOW THE SOFTWARE HELPS
Experience is hard to write down	INTERVIEWER holds a conversation, guided by a template, and asks follow-up questions where something is missing. The result is a structured document, the iDoc.
Every handover is different	The templates in INTERVIEWER can be adapted and duplicated until they fit your case exactly.
Knowledge should not gather dust in a document	The AI generator in CAMPUS turns iDocs into a first piece of learning content. The editorial team does the fine-tuning.
The successor needs an order to learn in	In CAMPUS you arrange the content with categories and tags and make it visible to the right group.

CHALLENGE	HOW THE SOFTWARE HELPS
After the farewell, questions come up that nobody expected	If the “Interactive Avatar” module is booked, the AI assistant Bryan answers questions based on your own content. This also requires the “AI Suite” module.

INTERVIEWER is the tool you use to capture knowledge. If you do not have a knowledge platform yet, it is enough to begin with: what matters most is that the knowledge is secured before the person leaves. How to build a platform afterwards is shown in the playbook Playbook Building a Knowledge Platform.

If you already work with CAMPUS, you can also capture knowledge from there. CAMPUS uses INTERVIEWER for this in part and then distributes the knowledge to the right people.

More in the manual: INTERVIEWER Securing one person’s knowledge and CAMPUS CAMPUS and INTERVIEWER.

WHAT YOU TAKE AWAY

- The first test shows whether your team has a retirement risk. The second shows for whom it is urgent.
- Few months and unique knowledge mean emergency mode. Three topics, immediately.
- INTERVIEWER secures the knowledge, CAMPUS brings it to the successor.

2

DECIDE

Plan the handover

A goal, a knowledge map and a plan that counts backwards from the last working day.

Decision 1: What does “secured” mean?

“Securing Hans’s knowledge” is not a goal but a wish. A goal describes what should be different after the farewell compared with doing nothing. Three questions help:

- **Who takes over?** One person, several or the whole team?
- **What must they be able to do?** Not “know everything”, but solve concrete cases themselves.
- **How will you tell?** For example: three months after the farewell, the successor solves nine out of ten cases without asking anyone.

Decision 2: The knowledge map

Before the first interview takes place, you draw up together what knowledge there is at all. Experience knowledge has four forms, and each needs a different question:

FORM	EXAMPLE	THE QUESTION FOR IT
Procedures	How a complaint is handled.	“What do you do, step by step?”

FORM	EXAMPLE	THE QUESTION FOR IT
Exceptions	The amount above which management decides.	“When do you do it differently?”
Relationships	How each regular customer wants to be addressed.	“Who do you call when …?”
Reasons	Why this rule exists in the first place.	“What happened back then?”

Procedures are often written down somewhere already. The other three almost never are, and they are exactly what retires along with the person. Rate each topic by how often it occurs and how expensive a mistake would be. Rare, expensive topics come first: your successor will learn the frequent ones in daily work anyway.

WORKSHEET · **Knowledge map**

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

AT BUTTERFLY EFFECT · *The list nobody has*

Hans came with a folder. “It’s all in there.” Mara leafed through it. The folder dated from 2009, and the most important thing in it was a phone list with seven crossed-out numbers.

So they started differently. Jonas stuck four notes on the wall: Procedures, Exceptions, Relationships, Reasons. “Just tell us what you did last week,” said Mara.

After an hour there were thirty-three notes on the wall. Under “Procedures” there were five. Under “Relationships” fourteen. Hans stood in front of them for a long time. “I wouldn’t have thought there were so many,” he said.

Decision 3: The backward plan

Do not plan from today forwards, but from the last working day backwards. Enter the date and the remaining leave. The plan shows you when each phase must begin at the latest.

WORKSHEET · **Backward plan**

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	

PHASE	DURATION (GUIDELINE)	BEGIN AT THE LATEST
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.

The durations are guideline values for a person with many topics. With few topics it goes faster. What matters is the order: first the map, then the interviews, then the tandem. And a buffer at the end, because something always comes up.

Clarify the ground rules

- **With the person themselves.** Before anyone plans anything, the manager talks to them. Not about a project, but about what matters to them so that their work carries on.
- **Data protection.** Interviews produce documents with names and sometimes customer data. Clarify with the responsible body what is stored and who may see it.
- **Information about third parties.** Whoever records how a customer or contact “ticks” records information about people. Write down only what the successor needs for the work, stay factual and limit visibility to the group that works with it.
- **Recordings.** If you record conversations, tell the person beforehand what will happen with the recording and the result, and obtain their consent.
- **Works council, if there is one.** Involve it early, especially if conversations are recorded or content is published with names.
- **Credit.** Ask the person whether their name should appear under the content. Most are pleased. Some are not.

> This playbook is not a substitute for legal advice. Check the requirements of your company and country with the responsible office.

WHAT YOU TAKE AWAY

- A goal describes what the successor can solve alone after the farewell.
- The knowledge map shows what has to be secured. The rare and the expensive first.
- Plan backwards from the last working day and subtract the remaining leave straight away.

3

BUILD

Team and roles

Who gives, who takes, who helps. And why the most important role is appreciation.

The roles in the handover

ROLE	TASK	WHO FITS
Knowledge holder	Tells, shows, checks the results for accuracy.	The person who is retiring.
Successor	Listens, asks follow-up questions, takes over step by step.	Someone with enough time and curiosity. Not whoever happens to be free.
Interview lead	Plans the conversations, prepares the templates, keeps the thread.	Someone who listens well. Often the editorial team.
Editorial team	Turns iDocs into learning content in CAMPUS.	Whoever likes writing and understands the target audience.
Approval	Checks content before it is published.	Not the same person who created the content.
Line manager	Frees up time, shows appreciation, decides in case of conflict.	The direct manager.
HR	Provides data, clarifies remaining leave, how the post is filled and contact after the farewell.	HR, involved early.

The heart of the handover is the tandem: the knowledge holder and the successor work together for weeks. The successor already sits in on the interviews. That way they hear not only the answer, but also how the question comes about.

The human side

For the person who is leaving, a handover can mean two things: recognition or being shunted aside. Which it becomes is decided in the first conversations.

- **Say why.** Not “We have to secure your knowledge”, but “What you have built should carry on”.
- **Let the person have a say.** Which topics matter to them? Who should take over? How do they want to be named?
- **Take worries seriously.** “I’m not needed any more” is a common thought. It does not go away through arguments, but through real involvement.
- **Make contributions visible.** A name under a piece of content is a small acknowledgement with a big effect.

WORKSHEET · **Conversation guide for the first conversation**

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

AT BUTTERFLY EFFECT · *I’m not gone yet*

Hans did not come to the second meeting. At the third he arrived late and said little. After the meeting Mara asked him whether everything was all right.

“You’re acting as if I were already gone,” said Hans. “I’ve still got ten months. And after that nobody here needs me anyway, if it’s all in the computer.”

Mara thought about it for a while. “We’re not replacing you,” she said then. “We’re keeping what you know. And I want you to decide who gets it.”

Hans chose Selin. Two years in customer service, the only one who had ever asked him a follow-up question about one of his exceptions. “She wants to know,” he said. “That’s worth more than experience.”

From task to permission

- In INTERVIEWER the interview lead is a member of the workspace. At least one person is Owner and invites the others. The knowledge holder does not need an account of their own if the conversation is held together.
- In CAMPUS the editorial team gets the Editor right, the approval role the Reviewer right. The knowledge holder checks for accuracy, but does not approve what they themselves have told.
- The successor is a User at first. If they later take over looking after the content, they get the Editor right for their area.

More in the manual: INTERVIEWER Roles in INTERVIEWER, CAMPUS Roles and permissions and CAMPUS The Reviewer right.

Free up time

The most common reason handovers fail: the person who is leaving does their full daily business until the last day. The handover is meant to happen “on the side”, and nothing happens on the side. Reduce their tasks explicitly and give the successor the cases that would otherwise have landed with them.

WORKSHEET · **Tandem plan**

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	–

WHAT YOU TAKE AWAY

- The tandem of knowledge holder and successor is the heart of the handover.
- Let the person who is leaving take part in the decisions. Involvement works more strongly than any argument.
- Without freed-up time, no handover. “On the side” is not a plan.

4

BUILD

Draw out the knowledge

Turning experience into documents with INTERVIEWER: cases, exceptions, relationships and the why.

How INTERVIEWER works in principle is explained by the knowledge platform playbook in the chapter Playbook Content and structure: an AI holds a conversation, guided by a template that knows which information a document needs. Where something is missing, it asks. The result is an iDoc. Here the focus is on how you use this for an entire career.

The right template

The template decides what the AI asks about. INTERVIEWER comes with ready-made templates, including ones for securing knowledge. Take them as a starting point, not as a rule:

- **Adapt.** Adapt the follow-up questions to your case: your terms, your systems and the points where things get expensive for you.
- **Duplicate.** Duplicate the template if you need several versions, for example one for procedures and exceptions and one for relationships and reasons. The original stays unchanged.
- **Reuse.** What proves itself with the first person is the template for the next.

How to do this is in the manual: INTERVIEWER Using templates and INTERVIEWER Building your own templates.

Plan the interview series

- **One topic per conversation.** Take the topics from the knowledge map, rare and expensive ones first. Closely related notes you combine into one topic, for example a major customer and the exceptions that apply to them.
- **30 to 60 minutes.** Longer gets tedious. Better two conversations on a big topic.
- **A fixed rhythm.** Two conversations a week over three months make around twenty iDocs. That is enough for most maps.
- **The successor sits at the table.** They do not ask the questions the AI asks anyway, but those only they have.

A good conversation

The template makes sure nothing important is missing. What it does not replace is an opening that gets the person talking. Four questions work almost every time:

INSTEAD OF …	… BETTER ASK
“How is a complaint handled?”	“Tell me about the most difficult complaint of last year.”
“Are there exceptions?”	“When did you last break a rule, and why was that right?”
“Who are the most important contacts?”	“Who do you call when things are on fire? And who definitely not?”
“Why does this rule exist?”	“What happened before this rule existed?”

Stories are not a detour. They are the shortest way to the exceptions, and INTERVIEWER still turns them into a structured document.

AT BUTTERFLY EFFECT · *The major customer from 2014*

This time Hans came without folded arms. Topic: major customers. Selin sat next to him with a pad on her knees.

“Tell me about the most difficult major customer you ever had,” said Jonas. Hans laughed. “2014. The Bergmann company. A wrong delivery, shortly before Christmas, and the head of purchasing wanted to cancel.”

He told the story and INTERVIEWER asked follow-up questions. What did he do first? Who did he inform? Why did he not offer a credit note straight away? “Because the man didn’t want money,” said Hans. “He wanted someone to admit that we’d messed up. I drove out there.”

Selin wrote a single sentence on her pad: Listen first, then pay. The iDoc was five pages long. But she would not have found that sentence anywhere.

Show instead of tell

Some things are better shown than explained: a screen in the system, a form, a handwritten list. Collect such things during the interview series as photos, screenshots or files. They will later be attached to the learning content in CAMPUS. If Bryan is booked, it also searches attached files and videos.

Have it checked

The person who did the telling reads every iDoc once more. Not to polish the wording, but to answer one question: is this right? Allow about a quarter of an hour per iDoc. After that it goes to the editorial team. A topic counts as secured once its iDoc has been checked.

More in the manual: INTERVIEWER Securing one person’s knowledge and INTERVIEWER Template and interview principle.

WORKSHEET · **Interview plan**

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

WHAT YOU TAKE AWAY

- Take a ready-made template, adapt it and duplicate it for your topics.
- One topic per conversation, two conversations a week, rare and expensive topics first.
- Ask for stories. They lead fastest to the exceptions.
- The successor sits at the table, the knowledge holder checks every iDoc.

5

BUILD

Handover and onboarding

iDocs become learning content, the tandem becomes responsibility. And then the last day comes.

From iDoc to learning content

An iDoc is secured knowledge. Learning content is knowledge you can find when you need it. The step in between is done by the AI generator in CAMPUS: it builds a first draft, including an outline, from one or more iDocs. The editorial team checks facts, tone and structure.

- **One question per piece of content.** A long iDoc often becomes three short pieces of content.
- **The answer first.** The story behind it comes afterwards, as an example.
- **Name and date.** If the person agrees, their name appears under the content.
- **Approval.** Content on goodwill gestures, prices or promises to customers goes through mandatory approval. Which levels there are is shown by the knowledge platform playbook: Playbook How strict the approval needs to be.

The successor gets the content in a sensible order: first the frequent cases, then the exceptions, finally the relationships.

More in the manual: CAMPUS The AI generator, CAMPUS Recipe for strong content and CAMPUS Approving and publishing.

The tandem in three stages

STAGE	HOW IT WORKS	DURATION (GUIDELINE)
1. Watching	The knowledge holder does the work, the successor watches and asks questions.	4 weeks
2. Doing it yourself	The successor does the work, the knowledge holder watches and steps in only when necessary.	6 weeks
3. Alone	The successor works alone. The knowledge holder can be reached, but is no longer in the room.	4 to 6 weeks

Stage 3 is the most important and the one most often left out. Only here does the successor notice what they do not yet know, while someone who does is still around. Every question from stage 3 is a candidate for a new piece of content.

The last two weeks

The last two weeks no longer belong to the handover but to the farewell. No new interviews, no big topics. Instead you go through this list:

WORKSHEET · **Handover checklist**

	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.	

	CHECK ITEM	DONE ON
☐	Looking after the content has a new person responsible.	
☐	The farewell is planned and the person's contribution is visibly honoured.	

AT BUTTERFLY EFFECT · *The last Friday*

In the last weeks Hans had hardly said anything when Selin was on the phone. He sat beside her, drank coffee and nodded now and then. Once he shook his head. Selin hung up and called back ten minutes later with a better answer.

On the last Friday there was cake and a speech that was shorter than Hans had feared. Then Mara showed something on the big screen: the Customer service category in CAMPUS. Eighteen items. Under each one stood the same name.

Hans looked for a long time. "Does it really say in there that at Bergmann you have to listen first?" Selin nodded. "Right at the top."

WHAT YOU TAKE AWAY

- ✓ Every iDoc becomes short pieces of learning content. One question, the answer first, the name underneath.
- ✓ The tandem needs all three stages. The "Alone" stage shows what is still missing.
- ✓ The last two weeks belong to the farewell. Honour what the person has achieved.

6

OPERATE

After the farewell

The first hundred days, closing gaps, maintaining content and the next person on the list.

The first hundred days

No matter how good the handover was, questions will come up that nobody foresaw. That is not failure, but the moment when the gaps become visible. Ask the successor to write down each of these questions, with a simple sentence: “Here I would have asked earlier.”

WORKSHEET · **Gap list**

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

Maintain the content

Knowledge ages. Customers change, rules change. Give each piece of content a review date and a new person responsible, usually the successor. How to set review cycles is shown by the knowledge platform playbook: Playbook Every piece of content has a shelf life. The name of the person who originally held the knowledge may stay all the same.

Contact after the farewell

Some companies agree that the person stays reachable for questions after the farewell. That can help if it is clearly regulated: voluntary, limited in time and agreed with HR. Without rules, “Feel free to call” quickly becomes a burden for both sides.

AT BUTTERFLY EFFECT · *A postcard from Lake Garda*

In June Selin’s phone rang. Bergmann. A delivery was late and the new head of purchasing sounded exactly as Hans had described him.

Selin opened CAMPUS, although she actually knew the answer. Listen first, then pay. Underneath was something else she had forgotten: with Bergmann never reply by email, always call.

She called. It took twenty minutes, and at the end the head of purchasing thanked her. On her gap list there was nothing new that day.

A week later a postcard from Lake Garda lay in the customer service pigeonhole. Four words: “How’s it going? Hans.”

The next person on the list

The first handover is a project. The second should be routine. Turn this playbook into a fixed process:

- **One list.** Once a year HR reports who will retire in the next three years.

- **One trigger.** At the latest 18 months before the last day, the line manager does the urgency test.
- **One template.** The templates in INTERVIEWER and the worksheets from this playbook are reused.

WORKSHEET · **Handover list**

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	

When it is not retirement

Retirement is the farewell with the longest warning time. The same question arises with every departure and every change, only with a shorter deadline. The path stays the same, you shorten it:

OCCASION	TYPICAL DEADLINE	WHAT IS DIFFERENT	START HERE
Parental leave, sabbatical	Months, plannable	The person comes back. Also plan the handover in the other direction: what has changed during their absence?	Chapter 2

OCCASION	TYPICAL DEADLINE	WHAT IS DIFFERENT	START HERE
Move within the company, promotion	Weeks	The person stays reachable. That tempts you into securing nothing. Draw up the map anyway, while the old job is still fresh.	Chapter 2, with a short plan
Resignation	Weeks	Emergency mode: three topics, immediately. Procedures, access and ongoing cases first.	Chapter 1, then Chapter 4
Resignation on bad terms	Days to weeks	Cooperation cannot be forced. Ask for a conversation anyway, without pressure. Meanwhile secure what can be done without the person: documents, ongoing cases and what colleagues know.	Chapter 2, map with the team, then the gap list

For all four it holds that the shorter the deadline, the more the order matters. And the more regularly you secure knowledge, the less often it becomes urgent.

✓ WHAT YOU TAKE AWAY

- ✓ Every open question after the farewell points to a gap. Write it down.
- ✓ Every piece of content needs a review date and a new person responsible.
- ✓ The first handover becomes a process that applies again every year.
- ✓ For parental leave, a move or a resignation you shorten the plan, not the order.

7

OPERATE

Measure and report success

Metrics on three levels, three points in time and a one-page report.

Three levels

LEVEL	QUESTION	METRIC
Coverage	Have we secured what we wanted to secure?	Share of topics on the knowledge map with a checked iDoc. Plus: how many of them are already published as content in CAMPUS.
Impact	Can the successor work?	Cases the successor solves without asking. Entries on the gap list per month. Time until full takeover.
Organisation	Is the company learning from it?	Share of the people on the handover list for whom a handover plan exists.

You set the goals for this in Chapter 2. No goal, no metric; no metric, no report.

Three points in time

ON THE LAST WORKING DAY

Coverage

What is secured, what is not?

AFTER THREE MONTHS

Impact

How many gaps have appeared, how many have been closed?

AFTER TWELVE MONTHS

Organisation

Has the project become a routine?

The one-page report

Whoever reads the report wants to know three things: did it work? What did it cost? What do we do next? Nothing more belongs in it.

WORKSHEET · **One-page report**

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?	

AT BUTTERFLY EFFECT · *Who is next?*

Three months after the last Friday, Mara put a single page in front of Katrin, the managing director. Thirty-three topics on the map, twenty-nine secured. Four entries on Selin's gap list, three of them now content in their own right. And Bergmann was still a customer.

Katrin read the page twice. Then she put it down and asked no question about Hans.

"Who is next?"

Mara already had the list with her.

WHAT YOU TAKE AWAY

- Measure on three levels: coverage, impact, organisation.
- Three points in time: last day, three months, twelve months.
- A report fits on one page and ends with the next name.

8

OVERVIEW

At a glance

The whole path on one page, all worksheets, a small glossary and your next step.

Three sentences carry this playbook. If you remember only them, you have the most important part:

FIRST

Order beats completeness

You do not secure everything. You secure first what happens rarely and becomes expensive when it goes wrong.

SECOND

Conversation beats writing

Telling is faster than writing, and with INTERVIEWER it still becomes a document.

THIRD

The person beats the method

Without the person who is leaving, nothing works. With them, almost everything does.

The whole path on one page

WORKSHEET · **Overall checklist**

	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

All worksheets

The worksheets appear where they are needed. Here you find them collected. To print and fill in, each one is available as a single PDF, and all together in the Workbook.

WORKSHEET	WHAT FOR	CHAPTER
Five warning signs and How urgent is it?	Is knowledge at risk, and for whom is it urgent?	1
Knowledge map	All topics of one person, rated by form, frequency and risk	2
Backward plan	When each phase must begin at the latest	2
Conversation guide for the first conversation	Winning the person over before planning	3
Tandem plan	Who gives, who takes, who helps, with time and permissions	3
Interview plan	Topics, opening questions and dates of the interview series	4
Handover checklist	What must be done before the last day	5
Gap list	Questions that were open after the farewell	6
Handover list	Who leaves next and whether a plan is in place	6
One-page report	The report to senior management	7

Small glossary

The most important terms of this playbook. The full glossaries are in the manuals, for example in the CAMPUS CAMPUS manual.

Bryan	The AI assistant of CAMPUS. It answers questions based on your own content, including attached files and videos. Part of the optional “Interactive Avatar” module, which requires the “AI Suite” module.
iDoc	The structured document that INTERVIEWER creates from a conversation.
AI generator	Creates a first draft, including an outline, in CAMPUS from files or iDocs. A person checks and refines it.
Gap list	Collection of the questions that were open after the farewell.
Emergency mode	The shortened path when time is not enough for the full plan: three topics, immediately, with the successor involved from the start.
Reviewer	The right in CAMPUS to check and approve content before publication.
Backward plan	Schedule that counts back from the last working day.
Tandem	Knowledge holder and successor working together for weeks.
Handover list	Overview of the people who will leave in the next few years, with urgency and status of the handover plan.
Template	Defines in INTERVIEWER which information a document needs. The follow-up questions of the AI are based on it. Templates can be adapted and duplicated.
Knowledge holder	The person whose knowledge is being secured.
Knowledge map	Overview of all topics of one person, arranged by form, frequency and risk.

Your next step

Write down the names of the three people who will retire in the next three years. Do the urgency test for each of them. And then have a coffee with the first one on the list before you plan anything.

Do you not yet have a place where the knowledge will be kept afterwards? That is described by the playbook Playbook Building a Knowledge Platform.

Would you like to know what this could look like for you? Arrange an initial consultation or request a demo. We are here for you.

Arrange an initial consultation https://8s.de/en/contact

WHAT YOU TAKE AWAY

- Three names, three urgency tests: that is where everything starts.
- The overall checklist guides you from the first conversation to the report.
- For the how there are the manuals, for everything else there is us.

Securing Knowledge Before It Retires
With INTERVIEWER and CAMPUS: from the retirement date to the first year afterwards

Edition 11/2026

This playbook is also available online, with links into the manuals:
help.8s.de/playbooks/wissenssicherung/

The timings in this playbook are guideline values for planning, not commitments. The playbook is not a substitute for legal advice. Butterfly Effect and all the people and companies in the story are fictional.

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