KNOWLEDGE TRANSFER + ONBOARDING

When the person who knows the job is leaving, what has to stay?

This sample shows how Four Bells turns one experienced employee's scattered know-how into a working path for the next person: what the role owns, what happens when, where the truth lives, what requires judgment, and how a supervisor knows the new hire is ready.

FICTIONAL SCENARIO

Pineglass Regional Utilities has five weeks before its Operations Support Coordinator retires after 14 years. The incoming coordinator starts one week into the project, creating a planned four-week overlap before the retirement date. The role connects customer requests, field work, records, purchasing, and recurring reports. The individual procedures exist in pieces. The sequence, exceptions, and judgment mostly live in one person's head.

CAPTURE Pull the recurring work, decision points, source records, relationships, and exceptions out of memory.	**ORGANIZE** Turn that knowledge into a role guide and operating rhythm that a new person can actually navigate.
TEACH Sequence the first 30 days around real performance: observe it, do it with guidance, then do it independently.	**VERIFY** Define what "ready" looks like in observable work — not attendance, confidence, or a completed checklist.

The result is not a binder of information. It is a transfer of capability.

WHAT THE ORGANIZATION ACTUALLY HAD

The job existed. The handoff did not.

In a knowledge-capture interview, experienced employees rarely speak in finished procedures. They speak in fragments — because the missing context is obvious to them.

"The Monday report is easy. Just use last week's and refresh the numbers." **Which numbers? From where? What makes a report ready to send?**	*"I usually build tomorrow's field list after lunch."* **How late? From which queue? What gets priority? Who approves it?**
"If an order says pending, check the note. Pending can mean two different things." **What are the two meanings, and what action belongs to each?**	*"I told her we'd be out Thursday."* **Who confirmed Thursday — and what happens when the field schedule says something else?**
"Don't change the location record just because a caller says the map is wrong." **What should the employee do when the sources disagree?**	*"Finance needs the purchasing sheet before they start chasing us."* **When is it due, what belongs on it, and what counts as complete?**
"If you're not sure who owns something, ask me." **What happens after the person who says "ask me" is gone?**	

THE HANDOFF PROBLEM

None of these statements is useless. Each contains real expertise. But a new employee has to reconstruct the role by asking the right follow-up questions at the right moment — usually while the work is already happening.

The pages that follow turn those fragments into a system someone else can use.

OPERATIONS SUPPORT COORDINATOR

Role Transition & Onboarding Guide

A working guide for the incoming coordinator and the supervisor responsible for the handoff.

OWNER **Operations Manager**	VERSION **1.0**	EFFECTIVE **August 2026**	REVIEW **November 2026**
APPLIES TO **Incoming coordinator**	SUPERVISOR **Operations Manager**	WINDOW **First 30 days**	STATUS **Sample / fictional**

PURPOSE

Preserve the recurring work, decision rules, source records, relationships, and judgment that make this role function — then give a new employee a clear path from observation to independent performance.

HOW TO USE THIS GUIDE

IF YOU ARE THE NEW COORDINATOR

Use this guide to understand the shape of the role, find the right source when you need it, and know what you should be able to do at each stage. You are not expected to memorize the guide.

IF YOU ARE THE SUPERVISOR

Use live work whenever practical. Demonstrate first, then let the employee perform. Move to independence only when the work itself shows readiness — not because a date arrived.

WHO CONFIRMS READINESS The departing coordinator is a source during capture and demonstrates work during the planned four-week overlap. The supervisor confirms readiness, because the handoff has to work after the departing employee's last day.

A USEFUL BOUNDARY

This guide organizes the role. It does not replace technical procedures, safety requirements, or manager decisions. When a source conflicts with the real situation, treat the conflict as something to resolve — not something to smooth over from memory.

WHEN THE SOURCE DOES NOT EXIST YET

This guide names the sources the role depends on: routing table, priority rules, approval map, report templates, contact map. Where one of those is missing, informal, or out of date, treat it as a finding rather than an oversight. Identifying and building it is part of the transition work — not a prerequisite for beginning it.

KEEPING THIS CURRENT

The Owner named above maintains this guide. Lessons captured under Judgment + Exceptions, and updates flagged during the quarterly review, are folded in at the Review date — or sooner when the change affects daily work. A guide no one owns becomes one more thing the next person has to work around.

THE ROLE IN ONE PAGE

Keep the work moving — and keep exceptions from disappearing.

The Operations Support Coordinator is the connective role between incoming requests, field work, current records, recurring reports, purchasing, and the people responsible for each.

THE SIX OUTCOMES THIS ROLE OWNS

- **Requests are complete.** New customer and internal requests have the information needed for the next person to act.
- **Work is routed correctly.** Standard work reaches the correct queue; unusual work reaches the correct decision-maker.
- **Status stays current.** The work-order record reflects what is actually known — not what someone assumes happened.
- **Recurring reports arrive on time.** Weekly and monthly summaries use current source data and call out unresolved exceptions.
- **People get a next step.** Customers and internal partners know what happens next, even when the answer is "we need to verify this."
- **Judgment is visible.** When something does not fit the normal path, the coordinator records the issue and escalates it with enough context to act.

WHO DEPENDS ON THIS ROLE

CUSTOMER SERVICE Needs clear routing, current status, and realistic next steps.	**FIELD SUPERVISOR** Needs a clean next-day work list and exceptions identified before dispatch.
FINANCE Needs complete purchasing information and recurring reports on schedule.	**OPERATIONS MANAGER** Needs unresolved issues surfaced early — not discovered after a deadline.

THE STANDARD

Success means knowing what you can handle, where the current source lives, and when the work needs someone else's decision.

ONBOARDING PATH

Observe it. Do it with guidance. Then own the normal work.

The calendar gives structure, but time alone does not create readiness. Each phase ends when the employee can show the next level of performance in real work. Day numbers refer to scheduled workdays, not calendar days; Day 30 is the employee's 30th scheduled workday. Milestones are cumulative checks, not single-day assignments.

1 OBSERVE	2 GUIDED	3 INDEPENDENT
Days 1–5	**Days 6–15**	**Days 16–30**
See the full flow. Learn where the sources live. Watch standard requests from intake through handoff.	Handle standard work while the supervisor reviews before it moves forward. Practice exceptions deliberately.	Own normal daily work. Supervisor reviews the usual outputs and remains available for exceptions.
READY WHEN: You can explain the sequence and find the right resource without being walked to it.	READY WHEN: Your work is correct without step-by-step prompting and you flag uncertainty instead of guessing.	READY WHEN: You can manage the normal flow, meet recurring deadlines, and escalate the work that does not fit.

MILESTONES

DAY 5	**Find + explain**	Locate the primary systems/resources and describe how a standard request moves through the role.
DAY 10	**Route**	Complete and route standard requests using the guide, with review before release.
DAY 15	**Report**	Prepare the weekly open-work report from current source data, with normal supervisor review.
DAY 20	**Coordinate**	Build the next-day field list, surface conflicts, and complete the handoff without step-by-step prompts.
DAY 25	**Recognize + escalate**	Handle a request that does not fit the guide: preserve the facts, identify the correct decision-maker, and document the escalation.
DAY 30	**Own the normal flow**	Manage routine work independently and escalate exceptions with the facts needed for a decision.

LEARN THE SHAPE OF THE ROLE

Week 1: see the whole system before owning a piece of it.

The first week is a guided walk through the work: where requests begin, what changes hands, which source matters, and what happens when the normal path breaks.

BEFORE DAY 1

Supervisor prepares: system accounts and permissions; shared-drive and current-template access; overlap/shadowing time; live work appropriate for guided practice; and a backup person for questions when the departing coordinator is unavailable.

DAY	FOCUS	EMPLOYEE DOES	SUPERVISOR CONFIRMS
1	**Role + sources**	Follow one request from intake to completion. Locate the work-order queue, routing table, report templates, contact map, and current calendar.	Employee can find each source again without being led to it.
2	**Request intake**	Shadow several standard requests. Complete two practice entries from provided scenarios.	Required information is captured; unknown information is left unknown, not filled from assumption.
3	**Routing + status**	Route supervised live requests. Compare work-order status with supervisor/field notes.	Employee uses the current source and recognizes when two records disagree.
4	**Field handoff**	Watch the next-day list get built. Draft a parallel version and compare decisions.	Due work is included; unclear priority or status is flagged before handoff.
5	**Reports + exceptions**	Walk through the weekly report. Practice one missing-information case and one conflicting-record case.	Employee knows what to stop, what to ask, and who owns the next decision.

COACH THE WORK, NOT THE BINDER

Use real examples whenever practical. Explain the decision, then let the employee make the next one. If the supervisor has to rescue every step, the employee has not yet had a chance to learn the sequence.

WEEKS 2–4

The employee is ready when the work shows it.

These are the major performance checkpoints for the first month. Each states what the employee must do, the resources available, and the standard that separates "still learning" from "ready for normal work."

1 ROUTE A STANDARD REQUEST DAY 10

Using the work-order system, routing table, and current customer/request information, complete and route a standard request without step-by-step supervisor direction.

READY WHEN required fields are complete, the correct category/queue is used, unknown information is not guessed, and the record tells the next person what happens next.

2 PREPARE THE WEEKLY OPEN-WORK REPORT DAY 15

Using the current system export and approved template, prepare and route the weekly report without copying totals from a prior report.

READY WHEN required sections are complete, aged/unresolved work is called out, the report agrees with the current source data, and it reaches the established distribution on time.

3 BUILD THE NEXT-DAY FIELD LIST DAY 20

Using the open work queue, current status notes, and the supervisor's priority rules, prepare the next-day list for review before the daily handoff.

READY WHEN due work is included, completed/canceled work is removed, conflicts are flagged, and unresolved priority questions are surfaced before the list is released.

4 HANDLE AN EXCEPTION WITHOUT GUESSING DAY 25

Given an incomplete request, conflicting record, or situation outside the routing guide, pause normal processing and identify the correct next decision-maker.

READY WHEN the issue is described clearly, known facts are preserved, the correct person is contacted, the escalation is documented, and no unsupported promise or record change is made.

Notice what is not measured: confidence, time spent in training, or whether every page was read.

WHAT HAPPENS WHEN

The calendar experienced people carry in their heads.

A new employee needs more than a task list. They need to know what repeats, what has a deadline, and which work should already be visible before someone has to ask for it.

RHYTHM	WHEN	WHAT GOOD LOOKS LIKE
DAILY	**Start of day / mid-day / before handoff**	Review new and overnight requests; keep status current; build the next-day field list after the major same-day updates; surface anything that cannot be cleanly handed off.
WEEKLY	**Monday report / midweek aged-work review / Friday close**	Publish the open-work report; identify work that is aging without a clear next step; clear incomplete notes before the week closes.
MONTHLY	**First half of month**	Close the prior month's operations summary, route purchasing support, review recurring contractor/record items, and confirm the next month's scheduled obligations.
QUARTERLY / ANNUAL	**Scheduled review points**	Archive superseded templates, verify contact/approval lists, review recurring calendar items, and flag role-guide updates while the knowledge is current.

THE DAILY HANDOFF

- **Before the list moves forward:** remove work that is complete or canceled; verify anything marked "pending"; flag work with unclear ownership or priority.
- **At handoff:** the supervisor should be able to see what is planned, what is uncertain, and what decision is needed without reconstructing the day.
- **After handoff:** new changes belong in the current work-order record, not in a private note that disappears overnight.

WHY THIS PAGE EXISTS

The operating rhythm turns "I usually remember to…" into work the organization can see, teach, and review.

START WITH THE TRIGGER

When this happens, where does the work go?

The coordinator does not need a separate procedure memorized for every situation. The first question is simpler: what triggered the work, and which source governs the next action?

TRIGGER	START HERE	NEXT ACTION	ESCALATE WHEN
New service / internal request	Intake routing table + work-order system	Complete required facts, select the normal route, and leave a note that makes the next step visible.	Safety concern, unclear ownership, missing required fact, or no matching route.
Field status changes	Current work order + supervisor/field note	Update the current status and any required follow-up.	Two sources disagree or the change would alter a technical/location record.
Next-day list requested	Open work queue + priority rules	Build the draft list, remove closed work, and flag conflicts before handoff.	Priority is unclear, capacity is exceeded, or promised timing conflicts with current status.
Purchase / invoice support	Purchasing tracker + approval map	Verify request, owner, coding information, and approval before routing.	Required approval is missing or the work does not match the normal category.
Weekly / monthly report due	Current export + approved template	Refresh from source, review exceptions, complete required narrative, route on schedule.	Source totals do not reconcile or an unresolved item changes the report meaningfully.
Record conflict discovered	Preserve both sources	Stop the update, capture the conflict, and send it to the owner of the authoritative record.	Always — the coordinator does not resolve a technical record conflict from memory.

THE WORK BETWEEN THE PROCEDURES

Most errors do not start with “I ignored the procedure.”

They start when a situation almost fits the normal path — and someone quietly decides what the missing piece probably means. This page gives the coordinator a safer way to handle uncertainty.

NORMAL	The request is complete. The route is clear. The current record agrees with the situation.	Proceed using the normal process. Document the status and next step.
KNOWN EXCEPTION	The issue is familiar, but one required fact, approval, or owner is missing.	Pause. Get the missing piece from the listed source or owner. Then resume the normal process.
STOP + ESCALATE	There is a safety concern, a possible service interruption, a conflicting technical/location record, or a commitment outside confirmed authority.	Do not guess, edit around the conflict, or make a promise. Capture the facts and contact the listed decision-maker.
UNKNOWN	The situation is genuinely new or does not match the guide.	Describe what happened, preserve the current information, and ask who owns the decision. Add the lesson to the role guide after the issue is resolved.

USE THESE WORDS WHEN YOU DO NOT KNOW YET

TO A CUSTOMER	*“I can see the request. I need to verify the current status before I give you a time. Here is what I can confirm now...”*
TO A COWORKER	*“These two records do not agree. I have not changed either one. Here is what each currently says...”*
TO A SUPERVISOR	*“This does not match the normal route. Here are the facts I have, the part I cannot confirm, and the decision I need.”*

KNOW WHERE THE TRUTH LIVES

The new person needs to know who owns what.

Use this page when the work reaches the edge of the coordinator role. Bring the record number, the known facts, and the specific question whenever possible.

NEED	FIRST STOP	BACKUP	BRING WITH YOU
Field schedule / capacity	Field Supervisor	Operations Manager	Work-order numbers, requested timing, known constraints
Customer account / billing status	Customer Service Lead	Finance Coordinator	Account / request number and the exact status question
Purchase / invoice routing	Finance Coordinator	Operations Manager	Vendor, request owner, purchase reference, missing approval
Technical / location record conflict	Field Supervisor	Engineering / Operations Manager	Record IDs or screenshots; what each source currently says
After-hours urgent concern	Duty Supervisor	Operations Manager	Location, caller/contact, observed issue, current work-order status — no diagnosis

CONTACT MAP — The ownership table on this page is the role's contact map. A client version includes current names, direct contact information, and after-hours details where appropriate.

PRIMARY SOURCES

- **WORK-ORDER SYSTEM** - Current request, owner, status, and operational notes. This is the coordinator's primary record of work in motion.
- **ROUTING TABLE** - Approved path for standard request types and the owner for each normal branch.
- **SHARED DRIVE** - Current report templates, role guide, calendars, approval maps, and controlled reference documents.
- **GIS / LOCATION VIEWER** - Reference location information. The coordinator may view it, but does not "correct" conflicting technical/location records from memory.
- **PURCHASING TRACKER** - Current routing and approval status for purchase support.

ONE EXCEPTION, END TO END

What pages 04 through 08 look like on a Tuesday.

A customer calls about a service request submitted last week. The work order shows Pending. The note says only "waiting." The customer says a crew was at the address Friday and told her the line runs somewhere other than where the map shows it.

WHAT THE COORDINATOR NOTICED

Three problems inside one phone call: a pending status with no stated owner, a possible completed visit that is not in the record, and a reported conflict with the location record.

WHAT THE COORDINATOR DID NOT DO

Did not update the status to match what the customer described. Did not change the location record. Did not give a completion date.

WHAT THE CUSTOMER HEARD

"I can see your request, and I can see a crew was scheduled. What the record doesn't show yet is what happened Friday, and I'm not going to guess at it. I'm sending this to our field supervisor today. You'll get a confirmed status — not an estimate — by tomorrow afternoon."

WHAT WENT TO THE FIELD SUPERVISOR

WO-4471. Status shows Pending; note says "waiting" with no owner. Customer reports a crew on site Friday 8/7 and states the line location differs from the GIS view at 1420 Ridge Fork. I have not changed the work order or the location record. Need the actual Friday disposition, and a decision on whether the location discrepancy goes to Engineering. Customer expects a status call by Wednesday afternoon.

WHAT CHANGED AFTERWARD

The crew had finished the work and the disposition was never entered. The location the customer described turned out to match the record — she had been looking at a neighboring easement. Preserving both sources cost twenty minutes and confirmed the record; guessing would have corrupted it. Two lessons went into the guide: "waiting" is not an acceptable pending note — the note must name what the order is waiting on and who owns it; and a customer-reported location conflict routes to the Field Supervisor for confirmation, never to a record edit.

WHY THIS PAGE IS HERE

No procedure covered this call, and the coordinator did not need one. They needed to know what to preserve, what not to promise, who owned the decision, and what to write down so the next person is not solving it a second time.

WHAT USED TO LIVE IN ONE PERSON'S HEAD

The small things that make the role work.

Useful knowledge transfer identifies what changes the next person's action — then places that knowledge where it will be needed.

EXPERIENCED EMPLOYEE SAID	WHAT IT REALLY MEANS	WHERE IT NOW LIVES
"The Monday report is easy. Just use last week's and refresh the numbers."	The template is reusable; the data is not. Every report must start from a fresh current export.	**Weekly report objective + operating rhythm**
"I usually build tomorrow's field list after lunch."	Build it late enough to include major same-day changes, but early enough for the supervisor to resolve conflicts before handoff.	**Daily handoff + milestone**
"If an order says pending, check the note. Pending can mean two different things."	A pending order is not actionable until the note says what it is waiting on — customer, crew, approval, or other owner.	**Core work map + status standard + worked example**
"I told her we'd be out Thursday."	The coordinator can explain the next step, but completion timing belongs to the confirmed field schedule.	**Role boundary + exception language + worked example**
"Don't change the location record just because a caller says the map is wrong."	A caller description does not authorize a technical/location record change. Conflicts are preserved and escalated.	**Stop + escalate rule + worked example**
"Finance needs the purchasing sheet before they start chasing us."	The recurring purchasing support has an owner, a schedule, required information, and a visible backup path.	**Operating rhythm + people map**
"If you're not sure who owns something, ask me."	The role needs an ownership map that survives the person, not a single point of contact.	**People + Sources page**

CAPTURE RULE

Do not preserve a habit simply because "that is how we have always done it." Preserve the purpose, the decision, the source, and the useful exception. If a habit cannot be explained or validated, flag it for review instead of turning it into policy.

SUPERVISOR SIGN-OFF PRINT + SIGN

Thirty days is a target window — not automatic certification.

Mark the highest level the employee has demonstrated in normal work. “Independent” means the employee can perform without step-by-step prompting; normal review and access to a supervisor still apply. Use the standard shown for each row, then record the evidence used for sign-off below.

PERFORMANCE AREA	OBSERVED	GUIDED	INDEPENDENT	STANDARD
Route a standard request	☐	☐	☐	Required facts complete; correct route; no guessed information.
Prepare the weekly report	☐	☐	☐	Fresh source data; required sections complete; exceptions visible; routed on schedule.
Build the next-day field list	☐	☐	☐	Due work included; status current; conflicts surfaced before handoff.
Handle incomplete / conflicting work	☐	☐	☐	Stops normal processing, preserves facts, escalates to correct owner.
Find the right source / owner	☐	☐	☐	Uses the current resource to frame a specific question with the relevant record.
Close the daily handoff	☐	☐	☐	Leaves current status and next actions visible to the next person / shift.

Rows five and six are not separate objectives. Finding the right source traces to the Day 5 milestone; closing the daily handoff traces to the operating rhythm. Both are listed here because their absence shows up inside every other area on this page.

EVIDENCE / NOTES

Record examples, work-order or report references, support still needed, or the evidence used for sign-off.

IF AN AREA IS STILL OBSERVED OR GUIDED AT DAY 30

This happens, and it is not a failed onboarding. Name the specific gap — a missing practice opportunity, missing system access, or a decision rule that was never stated out loud — assign what closes it, and set the next check date below. Do not mark Independent to keep the calendar.

CLOSEOUT CONVERSATION

- **What can you now handle without help?** Name the work, not a confidence level.
- **What still slows you down?** Identify the missing practice, source, access, or decision rule.
- **What surprised you about the role?** New hires often expose assumptions the old process stopped noticing.
- **What should be added or corrected in this guide?** Update while the first-month experience is still fresh.

Employee: ____________________________ Date: ________________________

Supervisor: ____________________________ Next review / support check: ________________________

FOUR BELLS APPROACH

The deliverable is the handoff — not the binder.

A role-transition project succeeds when the organization can still perform the work after the experienced person is no longer available. The documents matter because they make that transfer visible, teachable, and reviewable.

1 CAPTURE THE WORK, NOT JUST THE WORDS

Interview notes become useful when the hidden questions are surfaced: when the work happens, which source governs it, what changes the decision, and what the next person needs to see. Capture routinely surfaces sources that were never written down, or that stopped being current years ago. That gap is usually part of why the knowledge concentrated in one person to begin with.

2 ORGANIZE AROUND PERFORMANCE

The new hire is expected to route, prepare, coordinate, recognize, document, and escalate specific work under normal conditions. Each checkpoint ties that performance to the resources available and a visible standard for readiness.

3 MAKE JUDGMENT TEACHABLE

The guide does not pretend every situation can be proceduralized. It shows where normal work ends, what facts to preserve, and who owns the next decision.

4 USE THE SUPERVISOR AS PART OF THE SYSTEM

Observation, guided practice, normal review, and sign-off are designed together. The departing employee may demonstrate the work during overlap, but the supervisor owns validation and sign-off so the handoff does not depend on the person leaving remaining available.

5 VERIFY WITH REAL EVIDENCE

Readiness comes from completed work that meets a visible standard. A completed checklist or thirty days on the calendar is not the same thing as independent performance.

WHAT THIS ASKS OF YOUR TEAM

With planned overlap, a role of this scope typically asks for three 90-minute capture interviews, one 60-minute supervisor validation, access to current procedures and templates, and two focused revision rounds. Typical calendar: four to six weeks.

NO OVERLAP? If the person has already left or cannot participate, reconstruct the role from live work, current records, documents, coworkers, and the supervisor. Mark assumptions for validation; recovery can begin immediately.

SCALES WITH THE ROLE

In a smaller organization, a “source” may be a shared spreadsheet, inbox, checklist, or simply a practice no one has written down yet. The ownership map may be shorter, but it matters more when two people carry most of the operation. Larger or regulated teams add stakeholders, validation steps, and role-specific references.

THE LARGER IDEA

Preserve the work that matters, remove avoidable ambiguity, and give the next person a fair path to competence.

Pineglass Regional Utilities is fictional. Live client-facing versions use the client’s approved branding and document-control conventions.

Four Bells Learning Design • Sample work • Structure, writing, and instructional design demonstration