### Critical Knowledge Interview Guide

**Purpose:** Capture essential institutional knowledge from departing or transitioning staff members

**Duration:** 60-90 minutes (can be conducted over multiple sessions)

**Participants:** Departing employee, direct supervisor, and/or incoming replacement

#### Pre-Interview Preparation

[ ] Schedule interview at least 2 weeks before departure date

[ ] Provide questions in advance to allow preparation

[ ] Gather relevant organizational charts, project lists, and contact directories

[ ] Designate note-taker or plan to record (with permission)

#### Section 1: Role Overview & Daily Operations

##### Current Responsibilities

1. **What are your top 3-5 most critical responsibilities?**
2. **Which tasks do you perform daily, weekly, monthly, and quarterly?**
3. **What deadlines or recurring cycles drive your work schedule?**
4. **Which of your responsibilities would cause the biggest impact if delayed or missed?**

##### Decision-Making Authority

1. **What decisions can you make independently vs. what requires approval?**
2. **Who do you typically consult before making major decisions?**
3. **What budget or resource authorities do you have?**

#### Section 2: Key Relationships & Stakeholders

##### Internal Relationships

1. **Who are your most important internal contacts and why?**
2. **Which colleagues do you collaborate with most frequently?**
3. **Who are the informal influencers or "go-to" people in your network?**
4. **Which internal relationships require the most careful management?**

##### External Partners

1. **Who are your key external contacts (vendors, partners, clients)?**
2. **Which external relationships are most critical to maintain?**
3. **What are the communication preferences or protocols for key external partners?**

#### Section 3: Projects & Processes

##### Current Projects

1. **What active projects are you leading or heavily involved in?**
2. **What is the current status and next steps for each major project?**
3. **Which projects have upcoming deadlines or milestones?**
4. **What potential roadblocks or risks should the team watch for?**

##### Processes & Procedures

1. **What processes do you manage that aren't fully documented?**
2. **Which routine tasks have informal steps or "tricks" that make them work better?**
3. **What workarounds or shortcuts do you use that others should know about?**

#### Section 4: Systems & Tools

##### Technology & Access

1. **What systems, databases, or tools do you use regularly?**
2. **Which shared drives, folders, or repositories contain your critical work?**
3. **What passwords, access codes, or system permissions need to be transferred?**
4. **Are there any personal accounts or subscriptions used for work purposes?**

##### Information Management

1. **Where do you keep important documents or reference materials?**
2. **What filing systems or organizational methods do you use?**
3. **Which information sources do you rely on for staying current in your role?**

#### Section 5: Institutional Knowledge & Context

##### Historical Context

1. **What important background or history should your successor understand?**
2. **What past decisions or events continue to influence current operations?**
3. **Which policies or procedures have exceptions or special considerations?**

##### Unwritten Rules

1. **What informal rules or cultural norms are important to understand?**
2. **Which approaches work best with specific colleagues or stakeholders?**
3. **What mistakes have you learned from that others should avoid?**

##### Organizational Dynamics

1. **Who are the key decision-makers for issues affecting your role?**
2. **What's the best way to get things done quickly in this organization?**
3. **Which committees, meetings, or forums are most important to participate in?**

#### Section 6: Success Factors & Advice

##### Critical Success Factors

1. **What are the most important things your successor should focus on in their first 30 days?**
2. **What would you do differently if you were starting this role today?**
3. **What resources or support will be most valuable for your successor?**

##### Warnings & Red Flags

1. **What are the biggest potential pitfalls or challenges in this role?**
2. **Which issues tend to escalate quickly and need immediate attention?**
3. **What should your successor be careful about or avoid?**

#### Section 7: Transition Planning

##### Immediate Priorities

1. **What needs to happen before you leave?**
2. **Which tasks or projects can be handed off vs. need to be completed?**
3. **Who else should be involved in the transition process?**

##### Follow-up Support

1. **What questions are likely to come up after you've left?**
2. **Would you be available for occasional follow-up questions?**
3. **How should your successor contact you if needed?**

#### Post-Interview Actions

##### Immediate (Within 24 Hours)

[ ] Distribute notes to relevant stakeholders

[ ] Identify any missing information that needs follow-up

[ ] Create action items for knowledge transfer activities

##### Within One Week

[ ] Create project status summaries based on interview

[ ] Update contact lists and stakeholder maps

[ ] Document critical processes identified

[ ] Schedule any necessary follow-up interviews

##### Before Departure

[ ] Ensure all identified systems access has been transferred

[ ] Verify critical documents are accessible to appropriate staff

[ ] Confirm transition plan is complete and understood

**Note:** This guide should be customized based on the specific role and organizational context. Not all questions will apply to every situation, and additional questions may be needed for specialized positions.