**WHAT A TRANSFER MANAGER NEEDS**

**TRANSFER ROLES**

– Transfer project managers at both sites

– Knowledge transfer team

Select representatives for every role. Consider involving senior experts for efficient transfer

– Steering group

A steering group shall include stakeholders from the product and transfer. The steering group   
 performs risk management and is responsible for balancing the transfer with ongoing operations

**IMPORTANT DATES**

– Decision to start the transfer

By this date the steering group shall be established

– Start date for knowledge transfer

Personnel in the receiving site shall be in place or rapidly being hired

– Hand over of responsibility

The receiving site is “in the driver seat”.

– Overall responsibility handed over

The sending personnel involved in knowledge transfer can be ramped down. The receiving site is   
 responsible for the work.

– End of supporting phase

Supporting personnel from the sending site can be ramped down, and the transfer project is completed

**ARTEFACTS AND PLANS**

– List of roles required at the new site (mirror?)

– Mapping between the current and the new staff

– Training plans for each role and competence area

– Activity plans: monitoring completed, ongoing and to start activities

– Detailed travel plan for onsite or offsite training and support

* Who, when, how long
* Visas
* Availability of personnel needed for training and learning from both sites
* Availability of working facilities, computers etc.
* Detailed agenda for the visit
* Bookings

**RISK FACTORS**

Product

* Product maturity
* Product complexity
* Dependability from other products
* Documentation coverage, accuracy
* Maintainability

Personnel, competence

* Receiving site:
  + Competence
  + Availability
* Sending site:
  + Availability for knowledge transfer
  + Motivation
* Transfer driver:
  + Receiving site (pull)
  + Sending site (push)

Market situation

* Market pressure
* Number of customers
* Solution life cycle

**RISK CHECKLIST**

**Process evaluation**

Decision for transfer: 🞎 Deliberate and discussed 🞎 Forced or announced

Vision of the end state of the transfer: 🞎 Clear 🞎 Unclear or not communicated

Vision for the product: 🞎 Clear 🞎 Unclear or not communicated

Vision for the people: 🞎 Clear 🞎 Unclear or not communicated

Process for transfer: 🞎 Established 🞎 Not established

# Product evaluation

Product maturity: 🞎 Mature 🞎 Immature

Complexity of the product: 🞎 Simple or small 🞎 Complex or large

Dependability of the product: 🞎 Independent or decoupled 🞎 Part of a compound system

Documentation: 🞎 Well-documented 🞎 Poorly documented

Product maintainability 🞎 Easy 🞎 Challenged

# People evaluation

Sending resources (competence): 🞎 Competence in place 🞎 Competence is missing

Sending resources (motivation): 🞎 Motivated 🞎 Unsecure or confused

Receiving resources (competence): 🞎 Competence in place 🞎 Competence is missing

Receiving resources (availability): 🞎 Resources in place 🞎 Resources are missing

# Market situation

Market pressure 🞎 Low pressure 🞎 High pressure

Amount of customers 🞎 Small 🞎 Large

Solution lifecycle 🞎 Declining 🞎 Increasing demands