

## Facilitating a Smooth Transition—ProWrite Captures the Tribal Knowledge of a Retiring Facility Manager

---

### Challenge

The facility manager at a large, state-funded organization was getting ready to retire, and with their departure, 25 years' worth of experience would retire with them. Their role involved overseeing daily operational tasks in addition to coordinating maintenance for two locations, and it was vital that their extensive knowledge be captured in writing. The transition to their successor needed to be seamless to ensure continuity of responsibilities. A manual that could be used for training and reference had to be completed before the facility manager left at the end of the year, which was closing in quickly.

### Solution

The organization had worked with ProWrite on [a previous project](#), so they confidently called on ProWrite to document the job responsibilities of the facility manager. To do so, ProWrite

- Interviewed the outgoing facility manager to gather firsthand knowledge of the work they performed every day, including less obvious processes they were used to doing as second nature.
- Interviewed the incoming facility manager to address topics they wanted to include in the manual.
- Reviewed existing documents, such as vendor lists, software guides, facility procedures, building maps, and notes prepared by the outgoing facility manager.
- Created a manual explaining the role and responsibilities of the facility manager, with detailed instructions and illustrations for daily, weekly, monthly, annual, and other regular tasks specific to each location.
- Added external contact lists, internal procedures, and relevant schedules to an appendix, which could be easily updated as information changed.
- Prepared drafts for review by the outgoing and incoming facility managers to check for accuracy, address questions and suggestions, and provide other feedback.
- Incorporated all feedback for final approval and submitted the completed manual for client ownership.

### Benefits

ProWrite delivered a comprehensive manual containing information and guidance on the various responsibilities of the facility manager. The manual, along with its appendix of internal and external resources, could serve as an easily accessible one-stop-shop for anyone performing the facility manager's role.

By following a structured, process-driven approach, ProWrite captured the retiring facility manager's expertise and institutional knowledge and equipped their successor with the tools needed to seamlessly continue operational excellence.

