

Business _____ Location _____ Date _____

Handover details

Who is handing over, to whom, the reason (leave, a new role or leaving), the handover dates, and who to ask after the handover ends.

The role in brief

What the role is for, who it reports to, and the results it's responsible for.

Work in progress

Each project or task in progress, where it's up to, the next step, the deadline and where the files are.

Recurring tasks and deadlines

Everything done daily, weekly, monthly and yearly, with the due date and where the instructions are. Mark any task that has no written instructions.

Key contacts

The customers, suppliers, colleagues and advisers the role deals with, what each relationship is about, and anything sensitive to know.

Systems, access and files

Each system and account the role uses, who grants access, and where the important files and passwords are kept (never write the passwords here).

Open issues and risks

Problems, complaints, promises made and anything that could go wrong in the next three months.

What only you know

The tips, workarounds and judgment calls that aren't written anywhere, such as which customer needs a call before an invoice.

Handover meetings and sign-off

The dates of the handover meetings, who attended, and the signatures of both people and their manager.
