READY-TO-USE TEMPLATE

A Handover the Next Person Can Use

A handover document and a short walk-through agenda.

30 minutes | Practical handover template

Use the supplied wording as it is, or change it together. The Word file and Notion template are editable. Keep only notes you need.

1 · Give the work a boundary

Start with what is being transferred and what is not.

Work being handed over:
From / to:
Effective date and duration:
What the new owner can decide:
What remains with someone else:

2 · Put the live work first

Repeat this compact entry for each active item.

Item:
Current state and last meaningful decision:
Next action and date:
Owner after handover:
Open question or risk:
Where the current source of truth lives:

Notes and changes for our situation

A Handover the Next Person Can Use

WORKING AGENDA / CONTINUED

3 · Explain the relationships

Include only contacts relevant to the work.

Person or team:
Why they are involved:
What they are expecting next:
How and when to contact them:
Any commitment already made:

4 · Show the recurring rhythm

Avoid passwords or secrets in this document.

Regular task and timing:
Where the instructions live:
Access needed and who can grant it:
What to check before acting:
Who can help if it fails:

Notes and changes for our situation

A Handover the Next Person Can Use

WORKING AGENDA / CONTINUED

5 · Walk through one real item

Reserve 15 minutes with the receiving person.

Explain the context and next decision. Ask the new owner to describe what they would do next. Compare the accounts without turning it into a test. Open the links together and check access. Mark anything still unresolved.

6 · Confirm the handover

Responsibility is agreed, not inferred from sending a file.

The new owner confirms they have the context and access to begin:
Still missing and who will resolve it:
Temporary support arrangement:
Date to check the handover worked:
Where this record will be kept:

The thinking behind it

Continuity depends on relationships, access, and understanding as much as documentation. Leave the next person with enough context to exercise judgment.

Read When Mattering Isn't Enough by Nic Payne

Keep the useful part

A shared record, not a transcript. Agree what belongs here and what should stay private.

Date / people / purpose

What we agreed

Next step / owner / support / date

What remains open

When we will return to it

What do I know by habit that the next person cannot reasonably guess?