

A LITTLE MORE CONTEXT.

The Streamlined Handoff Worksheet

Map out who owns the work, what they need to know, and when to bring you in.



ONE TASK. A CLEARER HANDOFF.

Two fillable worksheet pages + one completed example. Start with the task that keeps finding its way back to you.



Give the work somewhere to go.

Start with ONE task that keeps coming back to you. Fill this in with the person doing the work, then keep it beside the task in your shared workspace.

01 / Name the work

What starts this task? What does a finished result need to include?

02 / Make the owner clear

Who moves it forward? When is it due? Who covers if they are unavailable?

03 / Put the context within reach

Link the current brief, steps, files and a useful past example. Note access needed.

Use a PDF reader to type into the boxes, or print and write by hand. Keep client-sensitive details in your own approved workspace.

Agree on how it moves.

Complete the decision boundaries together. Approval rules need to be agreed with someone authorised to set them.

04 / Set the decision boundaries

What can the owner decide? What needs approval, from whom, and by when?

05 / Plan for a blocker

If information is missing or approval is late, who do they contact, where, and when? Silence is not approval unless expressly agreed.

06 / Name the next handoff

Who receives the result? Where is it sent? What tells them it is ready to use?

07 / Try it once, then update

Can the owner explain their next move? After one run, note what was missing and who will update these instructions.

Agreed by: _____ Review date: _____



See one filled in.

Illustrative example: sending a welcome email after a client signs and pays. Adapt the details and authority to your own business.

01 / Work + finish line

Trigger: signed agreement and confirmed payment. Finish: welcome email sent with the correct intake form and booking link; client record updated.

02 / Owner + timing

Client coordinator sends it within one business day of the trigger. If away, the named cover coordinator takes over.

03 / Context + access

The client record links to the signed scope, current welcome template, intake form and booking page. The coordinator needs CRM and shared inbox access.

04 / Decisions + approvals

Coordinator may personalise the approved template and use the agreed service links. Scope changes or a different start date go to the founder for approval before sending.

05 / Blockers + exceptions

Missing payment confirmation: ask the billing owner in the client task. Approval still pending by the due time: flag the deadline to the founder in the agreed channel; keep the task marked blocked.

06 / Next owner + signal

Coordinator assigns the delivery lead a kickoff-prep task with the client record linked. The lead confirms receipt in the task.

07 / Review after the first run

Check whether the links worked, the owner could find the scope, and the delivery lead received the handoff. Coordinator updates missing instructions before the next client.

YOUR NEXT STEP / PUT IT TO WORK

Give your next handoff a little more context.

Start with one recurring task you keep taking back. Use what you have mapped out to give its owner a clearer path forward.

01

Talk it through together.

Fill in the worksheet with the person doing the work.
Agree on the finish line, decision limits and when to bring you in.

02

Keep it beside the task.

Put the completed worksheet and current links where the work lives.
Check that the owner can open every file they need.

03

Review it after one run.

Ask what was missing, where they had to pause and whether the next owner knew it was their turn. Update the handoff together.

You can guide the work without taking every step back.

Save a blank copy and reuse it for the next task. Clearer handoffs take practice, shared context and small updates along the way.