

ROLE HANDOVER

Give the next person enough context to begin and a clear place to ask questions.

ROLE / GROUP

HANDOVER DATE

OUTGOING PERSON

INCOMING PERSON

1 WHAT THE ROLE IS HERE TO DO

Purpose, responsibilities and what needs someone else's approval.

2 PEOPLE + REGULAR COMMITMENTS

Who helps, who is affected, and which dates or routines matter?

3 DOCUMENTS + ACCESS ROUTE

List approved locations and who grants access. Do not write passwords here.

FIRST CONVERSATION / PERSON / DATE

WORK TO CARRY FORWARD

Use alongside the role handover. Make unfinished work and promises visible.

ROLE / GROUP

LAST UPDATED

OPEN WORK + PROMISES

NEXT ACTION / CONTEXT	WAITING ON	OWNER	BY

RISKS OR DECISIONS TO CHECK

What could be missed? Who can clarify or decide?

HANDOVER AGREED

What has the incoming person received, and what remains to follow up?