HANDOFF CLARITY WORKSHEET

A handoff is not complete when one person lets go. It is complete when the next person clearly receives the work and accepts ownership.

WORK COMPLETED	HANDOFF	CONFIRM RECEIPT	ACCEPT OWNERSHIP	NEXT ACTION	VERIFY	OUTCOME

1 **When work moves from one person or team to another, is it clear exactly what information must move with it?**

2 **Can your business tell the difference between a handoff that was sent and one that was actually received?**

3 **At what point does the next person clearly accept ownership of the work and its next action?**

4 **If the receiving person is unavailable, the information is incomplete, or the handoff is overdue, is there a defined backup or escalation path?**

5 **Can you identify open work that is currently between owners - sent by one person but not yet clearly accepted by the next?**

REMEMBER

The individual process steps may work. The risk may be in what happens between them.

TRACE ONE REAL HANDOFF

Choose a recent handoff and trace what happened from the moment one owner released the work until the next owner clearly accepted responsibility.

CUSTOMER / REQUEST / WORK ITEM
What are you tracing?

HANDOFF TRIGGER
What event caused responsibility to move?

INFORMATION THAT MUST MOVE
What context, promises, timing, approvals, or exceptions are required?

RELEASING OWNER

RECEIVING OWNER

HOW RECEIPT IS CONFIRMED
How do you know the next person actually received it?

WHEN OWNERSHIP OFFICIALLY CHANGES
What event shows the next person now owns the work?

EXPECTED NEXT ACTION
What should the receiving owner do next, and by when?

BACKUP / ESCALATION PATH
What happens if the handoff is incomplete, overdue, or the owner is unavailable?

CURRENT-STATE HANDOFF

DESIRED-STATE HANDOFF

INFORMATION GAP

OWNERSHIP GAP

TIMING / VISIBILITY GAP

FIRST IMPROVEMENT TO MAKE
What one change would make this handoff clearer or more reliable?