

Handover template for projects

Project Name: [Project Title]

Project Manager: [Manager's Name]

Start Date: [Date]

Expected Completion Date: [Date]

Successor: [Successor's Name, if applicable]

1. Project overview

- **Objective:** Briefly describe the project goal and expected outcomes.
- **Scope:** Outline the project scope, including key deliverables and boundaries.

2. Current status

- **Progress:** Summarize current progress against planned milestones.
- **Challenges:** Highlight any challenges encountered and how they were addressed or need to be managed.

3. Key deliverables

- List upcoming deliverables with due dates and responsible parties.
- Include status (not started, in progress, completed) for each deliverable.

4. Upcoming milestones

- Detail critical milestones within the project timeline, including dates and specific objectives.

5. Resources

- **Documentation:** Direct project documentation, including plans, reports, and meeting minutes.
- **Tools and Platforms:** List tools and platforms used in the project, with access information if necessary.

6. Team and contacts

- Provide a list of project team members, their roles, and contact information.
- Include key stakeholders and external contacts relevant to the project.

7. Risks and mitigation strategies

- Outline identified risks and the strategies in place or recommended for mitigation.

8. Handover meetings

- Schedule or recommend meetings with critical team members or stakeholders to discuss the handover and address any questions.

9. Additional notes

- Share insights or advice that could assist in the successful continuation of the project.

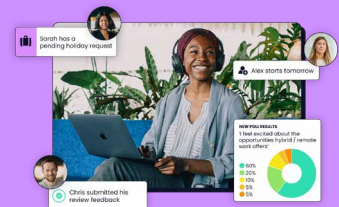
Signature: _____

Date: _____

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Handover for change of role

Employee Name: [Employee's Full Name]

Current Position: [Employee's Current Job Title]

New Position: [Employee's New Job Title]

Transition Date: [Date]

Transition checklist

Document current responsibilities

- **Objective:** Briefly describe the project goal and expected outcomes.
- **Scope:** Outline the project scope, including key deliverables and boundaries.

Compile key documentation

- **Operational Manuals:** Gather any operational manuals or guidelines relevant to your current role.
- **Project Documentation:** Ensure all project-related documents are up-to-date and accessible.

Digital assets transfer

- **Access Rights:** List all digital tools and platforms you use, noting any access rights or permissions that need to be transferred.
- **Files and Data:** Ensure all relevant digital files are organized and stored in a shared location.

Schedule knowledge transfer sessions

- **Meetings with Successor:** Arrange meetings with your successor to go through your task list and any critical projects.
- **Training Sessions:** If specific skills or knowledge are required, schedule training sessions to facilitate skill transfer.

Update key contacts

- **Internal Contacts:** Provide a list of key internal contacts, outlining the nature of your interactions.
- **External Stakeholders:** Include contact information for any external stakeholders or clients, noting any ongoing communications or commitments.

Handover meetings

- Team Meeting: Inform your team about your role change and introduce your successor, if applicable.
- Stakeholder Meeting: Arrange a meeting with key stakeholders to communicate your transition and ensure continued project support.

Final review

- Handover Document: Review the handover document for completeness and accuracy.
- Feedback Session: Meet with your manager and successor to address any final questions or concerns.

Signature: _____

Date: _____

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