HANDOFF READY

A handoff is complete when the receiving team can act, not when the sender clicks Send.

A simple, reusable operating tool for teams that want clearer handoffs and less status chasing.

Use this on one real workflow

- ☐ Final scope / request confirmed
- ☐ Primary contact and decision-maker identified
- ☐ Important promises and constraints captured
- ☐ Commercial/approval prerequisites complete
- ☐ Timing and dependencies understood
- ☐ Files/access/materials available or owned
- ☐ Known risks documented
- ☐ Receiving owner named
- ☐ First delivery action assigned
- ☐ Customer knows what happens next

Design notes

- Keep the gate small enough to use every time.
- Reject incomplete handoffs visibly instead of allowing silent workarounds.
- Measure why handoffs fail; repeated reasons belong in the upstream process.

> **How to use it.** Do not complete this from memory in a conference room. Pull up one active or recently completed record and test the checklist against what actually happened. Any item that repeatedly needs a text, a side spreadsheet, or an owner stepping in is a candidate for workflow redesign.

Want a real answer for your workflow? Book a free 30-minute Workflow Assessment at bradleyhankins.com/contact.