Project handoff template

The outgoing owner fills this in before the handoff date. The new owner reads it, adds questions, and confirms in writing when they own the project.

Project handoff: [project name]

From [outgoing owner] to [new owner] · Handoff date: [date] · Questions to [outgoing owner] until [date]

STATUS IN ONE LINE

[On track, at risk or off track] because [reason].

GOAL AND DEADLINE

[What done looks like], due [date].

OPEN WORK

- [Task], [owner], [status], next step: [one line]

DECISIONS ALREADY MADE

- [Decision], see [link]. Don't reopen without [person].

RISKS AND OPEN QUESTIONS

- [Risk]: watch for [signal]; if it happens, [action].

PEOPLE

- [Name], [role]: [what they need from the owner, and how often].

ACCESS TO TRANSFER

- [Tool or account]: granted by [person] by [date].

RECURRING COMMITMENTS

• [Report, meeting or check-in], [how often], for [audience].

WHERE THINGS LIVE

Plan: [link] · Files: [link] · Main thread: [link]

FIRST THREE THINGS TO DO

1. [Most urgent action] 2. [Next] 3. [Next]