I'm not a bot



Start with a free 30-day trial. No credit card required. Using this construction project handover checklist template can be run like a digital Site Diary and gives you a lot more flexibility and functionality than building it in Word or Excel:Record or update project handovers while on site via mobile or tablet so it's easy to run through every checklist item in person. Customise your checklist items depending on the project requirements with the drag and drop form builder. Use photos and videos to showcase issues with timestamps and geotagging to build a strong audit trail. Share completed construction project handovers as professionally formatted PDF or CSV to internal team members or external clients. Maintain compliance by using digital eSignatures for project signoff. Contractor Performance Report template Document, assess and share contractor performance more effectively using this smarter contractor performance with this digital log book template. Construction Contract sample and template can be adjusted and modified for any of your construction contract sample and template can be adjusted and modified for any of your construction contract. Is the format of this project handover checklist word Doc, Excel, PDF or something else? The format of this project handover checklist is that it's a proper digital document, with the capabilities of a Word Doc, Excel Spreadsheet and PDF embedded in one. Similar to Word, the template can be edited with ease, which is the main strength of this format. The benefits of a digital document over and above Word, Excel and PDF is that Dashpivot digital documents can be converted into a register style or 'Excel' format in one click, and exported to PDF in one click, rather than moving information between formats. How can I share this construction project handover checklists in a few ways. You can share your project handover checklists in a few ways. You can share your project handover checklists in a few ways. workflows so that external parties (e.g clients or contractors) get notified when you submit a handover checklist, which they can review and signoff themselves, locking up the document as complete to avoid handover disputes. Does Sitemate offer other construction project checklists and templates? Yes - Sitemate has a free library of thousands of construction templates which are used by thousands of companies every day. While project handovers are critical, many of the most important and frequent forms filled in on construction project delivery, including project delivery, including project delivery, including project handovers are critical, many of the most important and frequent forms filled in on construction project delivery, including project delivery delive delivery, capturing daily project data and storing it in a secure and user friendly format, which can then be wrapped up and even attached to a neat project handover checklist. Professional Presentation & Document Templates For Every OccasionWe are dedicated to making your work and study much easier than before with professional presentation templates, docs and other office templates. Slidesdocs provides a wide selection of office templates and background, Google Slides themes, Microsoft Word, Excel and infographics. You can search with topics for free and download these templates for your upcoming presentations or daily work. Most of them are easy to edit and customize with your own topic. Improve your work efficiency right now! Download Simple Project Handover Template Microsoft Word | Adobe PDF | Google DocsAccount for all components of a successful project handover with this simple project handover report template. Enter general project information, overview details, scope, schedule costs, benefits, customers, risks, constraints, and assumptions. This template is the perfect tool for project management tips and resources, see this collection of free, downloadable project management templates. Work with flexibility and securityfrom small projects to large-scale processes and entire portfolios. Smartsheet helps you break down projects into tasks, track progress, and manage resources, budgets, and workflowsall in one unified platform for seamless collaboration and delivery. Try Smartsheet for Free Download Construction Project Handover Checklist Template Microsoft Excel This construction project handover checklist template is an all-inclusive document for your construction project handover, either from one project handover, eit dates, dates completed, priorities, and statuses. The template also includes pre-built Required Testing, Warranties / Guarantees, Certificates, and Final Submittals sections. Fill out each section to ensure that youve accounted for everything in your construction project. Download Project Handover Plan TemplateMicrosoft Excel | Microsoft Word Use this dynamic project handover plan template to project square for a project square for square fo suggested or required training for a successful project handover. For helpful tips on successful project plan templates for Microsoft Excel | Microsoft Exce handover checklist template. Enter a unique ID number and description for each project activity, as well as its owner, due date, status, and any additional comments. The template includes fields for Planned Work Complete these fields to ensure that the new team has all relevant project closure, read this comprehensive guide to project closure, read this comprehensive guide to project closure. Download Project closure, read this comprehensive guide to project closure, read this comprehensive guide to project closure. stakeholders with comprehensive project details for a successful project handoff using this project handoff using the project handoff using the project hand transition. This template is a perfect solution for a project manager or client Acceptance Sign-Off FormMicrosoft Excel | Microsoft Word | Adobe PDF Provide clients with a comprehensive project handover document using this project client acceptance sign-off form. The form includes a Project summary, contract data, project summary, contract da and clients can add dated signatures upon project acceptance. Download Software Project Handover document template provides a new project manager, Scrum master, project team, or client with everything they need to know for smooth project handoff. Enter organization details, contact information, and project overview details, background, resource requirements, scope of work, deliverables, and milestones. The template also includes a built-in, software-specific Stakeholders list to ensure that the new manager, team, or client can successfully implement the project after handoff. Download IT Project Handover TemplateMicrosoft Excel | Microsoft Word IT project managers and other IT personnel can use this customizable project transition between departments or teams. Enter project overview details, scope, tentative schedule, resources, and benefits, such as cost savings, higher productivity, improved compliance, and lower maintenance costs. Use this template to ensure that project details are available to team members, project recipients, and other stakeholders in a single, shareable report. Download Sales-to-Customer-Success-Handoff TemplateMicrosoft Word | Google DocsThis all-inclusive sales-to-customer-Success-Handoff TemplateMicrosoft | Google DocsThis all-inclusive sales-to-customer-Success-Handoff | Google DocsThis all-inclusive sales-to-customer-Success-Handoff | Google DocsThis customer-success-handoff template provides project managers with an easy-to-use project transition form that helps facilitate transitions between sales and customer success teams. Enter customer team information, customer team information, internal team information, internal team information, internal team information, customer team information, internal team informatio company. The template also includes space to include key performance indicators (KPIs) for measuring success, as well as growth opportunities, so that all sales and customer success team members are aware of how proactive customer strengthen client relationships. A project handover template is a document that helps ensure that a project transitions smoothly between managers or from an internal team to a client. These templates usually include key project handover template, you can ensure that all team members, board members, project managers, and clients understand the projects objectives, goals, business case, and the project managers to clearly communicate to the handoff team what the additional work will entail. With a comprehensive handover document in hand, all stakeholders can be confident that they have accounted for every essential project component. Once the project handover document is completed, the team, project manager, or client should have a clear understanding of what remaining work must be completed in order for the project to succeed. Although project handover templates vary, most project handover templates include the following components: Project Name: Enter the name of the project manager who is currently responsible for the project manager. List the name of the project sponsor: Provide the name of the project sponsor or the project board that will oversee the projects handover. Organizational Unit: Enter the name of the project Status: Provide the project status for the project sta the date the project will commence, so that its clear to the receiving project team when work begins. Completion Date: List the following project overview details: Project Objectives: List the projects primary goals. What does it hope to achieve? Problem or Issue: List the primary problem or issue that the project. Why was it undertaken? Business Case: Describe the business case for the project. Why is this the best solution to the project. Why was it undertaken? Business Case: Describe the business case for the project. Why is this the best solution
to the project. Why was it undertaken? Business Case: Describe the business case for the project. Why is this the best solution to the project. Why is this the best solution to the project. Why was it undertaken? Business case for the project. Why is this the best solution to the project. Why was it undertaken? Business case for the project. Why is this the best solution to the project. Why was it undertaken? Business case for the project. Why is this the best solution to the project. Why was it undertaken? Business case for the project. Why is this the best solution to the project. Why was it undertaken? Business case for the project. Why is this the best solution to the project. Why was it undertaken? Business case for the project. Why is this the best solution to the project. Why is this the best solution to the project. Why is this the project. Why is this the project. Why is this the best solution to the project. Why is this the project will be a project with the project will be a project. Why is the project will be a project will be a project will be a project. Why is the project will be a project will the project. Expected Deliverables: List the individual deliverables of the project Risks, Constraints, and Assumptions: Provide the receiving team with a list of project Risks, Constraints, and assumptions that they should account for in their project Scope: Describe what is in scope for the project, and be specific about what is out of scope. Project Transition Plan: Provide a high-level description of the project tasks and deliverables that the receiving team must complete. Tentative Schedule: Provide a proposed due date for the project tasks and deliverables that the receiving team must complete. Tentative Schedule: Provide a proposed due date for the project tasks and deliverables that the receiving team must complete. Tentative Schedule: Provide a proposed due date for the project tasks and deliverables that the receiving team must complete. Tentative Schedule: Provide a proposed due date for the project tasks and deliverables that the receiving team must complete. Tentative Schedule: Provide a proposed due date for the project tasks and deliverables that the receiving team must complete. Tentative Schedule: Provide a proposed due date for the project tasks and deliverables that the receiving team must complete. Tentative Schedule: Provide a proposed due date for the project tasks and deliverables that the receiving team must complete. Tentative Schedule: Provide a proposed due date for the project tasks and deliverables that the receiving team must complete. Tentative Schedule: Provide a proposed due date for the project tasks and deliverables that the receiving team must complete. Tentative Schedule: Provide a proposed due date for the project tasks and deliverables that the receiving team must complete the project tasks and deliverables that the receiving tasks are the project tasks and deliverables that the receiving tasks are the project tasks and deliverables that the receiving tasks are the project tasks and deliverables that the receiving tasks are the project tasks and deliverables that the receiving tasks are the project tasks project role and responsibility. Tasks: List the remaining tasks that the new team must complete after project handover. Training: Detail any training to complete the project planning to complete after project handover. Training: Detail any training to complete the project handover. Training the pro improve collaboration and increase work velocity -- empowering you to get more done. The Smartsheet platform makes it easy to plan, capture, manage, and report on key metrics and get real-time visibility into work as it happens with roll-up reports, dashboards and automated workflows built to keep your team connected and informed. When teams have clarity into the work getting done, theres no telling how much more they can accomplish in the same amount of time. Try Smartsheet for Free Get a Free Smartsheet Demo Youre transferring a project from one manager to another. Or maybe youre welcoming a new employee to the team. How do you ensure the shift from before to after happens seamlessly? Simple with a well-structured handover document is a written record of daily tasks, details of ongoing projects, work schedules, deadlines, upcoming events and other crucial work information. This is an integral part of any knowledge management strategy that supports consistent and effective processes. It's a comprehensive report of responsibilities that project managers use to transfer to incoming employees or teams. Are you wondering which handover documents are important for your team? This list of handover documents templates will cover all bases for you. Jump to a template: Handover Document Takeaways Handover documents are crucial for smooth transitions in a company, improving retention and engagement. They include details of tasks, ongoing projects, deadlines, and other important work information. Five essential elements of successful project handover documents are a complete responsibility set, a list of ongoing tasks, upcoming deadlines, learning resources, and key stakeholders. To create a handover document, develop an action plan, define project goals and expectations, identify key stakeholders, document deliverables and timelines, consider potential risks, compile training resources, and transfer ownership of resources and knowledge. What is a Handover Document? Handover documents are written reports created by project managers, or employees leaving a company or changing their role. They're a form ofvisual communication that documents the project team's: Role, responsibilities and expectations. Project workflows. Status and progress. Important milestones and deadlines. Points of contact and key stakeholders. Creating atransition planensures that whoever takes over has all of the information they need to continue ongoing projects, understand various processes and keep the business moving forward. {{banner-ads"}} 12 Free Handover Document Templates Depending on the scope of the work, you might have different needs for your handover template. Here are 12 handover templates you can try today! Project handover templates you can try today! Proje make sure the incoming team members understand the nitty-gritty of the project title and description: Brief project title and description: Brief project title and description: Brief project summary: Project summary: Project title and description: Brief project summary: Project Project Handover Checklist Template Project handover checklist template Project handover checklist template Create a checklist template. Key contacts and stakeholders and contact information. Known issues and challenges. Resources and documentation. Try this project checklist template for free. successful project handover. Project goals, objectives and stakeholders. Roles and responsibilities, project closure, approvals and stakeholder sign-offs. Project documentation. Try this project checklist template for free. Change Management Template Change management plan template Change management means exactly how it sounds: the process of management handover documentation helps teams with change management activity. Use this template to build change management SOPs to maintain consistency including: Change management plan. Try this change management template for free. Check out our list of the top free change management software to guarantee easy transitions for your entire organization. Transition Plan Template Transition plan template A transition plan template is designed to help you support offboarding one individual and handing off their responsibilities, ensuring everything is accounted for, and minimizing disruptions. This template includes: Regular duties and responsibilities (broken down by year, month, week and day). Outstanding projects. Upcoming deadlines. Contacts. Communication plan. Try this transition plan template Knowledge Transfer SOP template When an existing employee is leaving or you're onboarding a new employee, your knowledge transfer strategy plays a key role during personnel changes. One of the best ways to do this effectively is by using a well-structured knowledge handover plan or SOP template. This standard operating procedure includes: A blueprint of the knowledge being shared. The owner and the recipient. Date, methods and objectives. Try this free knowledge transfer SOP template for free. Employee offboarding template An employee offboarding template and procedures for when an employee offboarding template for free. Employee offboarding template An employee offboarding template for free. resign or take extended leave. The handover documentation will
break down the company policies and procedures that the offboarding employee will need to follow, with a list of tasks they need to accomplish: Detailed exit letter. Detailed exit letter. Detailed exit letter. instruction list. Try this employee offboarding template for free. Scribe tip: Create an employee offboarding checklist to manage employee departure consistently and securely. Method of Procedure Template Method of Procedure (or MOP) template outlines process instructions in manufacturing, construction, and IT Cost: How much will the project cost and what is the proposed budget? Time: What communication do we need? Quality: How will you ensure the quality of your project and how you intend to tackle them. Training: What training is required to build the necessary skills to complete the project? Try this method of procedure template for free. Standard Work template for free. Standard work template is best for assembly, production, safety, quality control and maintenance teams. Still, while standard work is usually associated with manufacturing environments, it can also help office settings optimize their workflows to enhance performance. This template includes a(n): Introduction: A description of the process. Try this standard work template for free. Construction Site Work Instruction Site work instruction site work instruction. template This construction site work instruction template provides clear and detailed step-by-step procedures and instruction project tasks, making handovers easy and seamless. Use this template to improve your construction project tasks, making handovers easy and seamless. Use this template to improve your construction project tasks, making handovers easy and seamless. Use this template to improve your construction project procedures and instruction project tasks, making handovers easy and seamless. Use this template to improve your construction project procedures and instruction project tasks, making handovers easy and seamless. smoother completion of construction project tasks. Improve communication. Ensure compliance. Aid in record-keeping. Try this construction site work instruction template According to 86 percent of customers, good customer service can convert a onetime client into a long-term customer. A sales-to-customer experience and maximizing satisfaction from the start. This template ensures a smooth handover, delivering a frictionless customer experience and maximizing satisfaction from the start. This template covers the basic details of the: Account executive. Account manager. Customer. Deal. Tools used by the customer. Problems faced by the client. Goals and success. Use this sales to service handoff template for free. Runbook template Runbook template for free. Runbook template Runbook template Runbook template for IT professionals who manage complex computer systems and applications. Use this runbook template to create handover documentation outlining: Procedures. Instructions and guidelines. Checklists. Troubleshooting. Change management processes. Try this runbook templates in the Scribe templates in the Scribe templates in the Scribe templates in the Scribe templates. template gallery. Use these templates to: Train your teammates. Showcase your best practices and procedures. Get projects done faster. ... all for half the time or entirely, their knowledge of the role and responsibilities goes with them. Without effective employee leave management, you'll inevitably run into confusion, inefficiency and reduced productivity. 71 percent of organizations without an effective employee offboarding and handover process face such consequences. Effective handover documentation along with solid knowledge management strategies can help you save explicit knowledge as well as tribal knowledge the unspoken wisdom of how your company runs. The proper project continuity. Here are five essential elements to keep in mind when creating a work handover template. 1. Project Overview A brief description of the project, task, or role being handed over, including its purpose, objectives, and key deliverables. 2. Responsibilities and Duties Mention the details of the day-to-day tasks that an employee takes up. Make sure these duties are explained in detail, including: Tools. Format. Task description. Processes, systems and tools used. Project documentation strategy. Performance expectations. Feedback and observations. Current and previous approaches. Tips and strategies that helped the outgoing employee must be accountable to. Any other vital information. When written well, project handover documents will allow new employees to start following their duties without any struggles or confusion. 3. Current Status Project, task, or role, including any outstanding tasks, deadlines, risks, and issues. Along with each ongoing task title, the leaving employee must include details like the progress report, research conducted and results. Key success factors and main procedures related to the ongoing tasks are also crucial. If this feels like too much workwhich it can be, use a time-saving document builder like Scribe. Scribe captures your screen while you go through your task, building a visual guide, complete with text, links and annotated screenshots. You can easily update steps to cater to each new hire and process. Upcoming deadlines for every project. Record all project timelines systematically using the handover document format below to avoid errors. Create a visual flow of the timelines to simplify tracking all the start and finish dates. You can also color code these timelines for every team or milestone, like in this example. 4. Learning Resourcesand Documentation Developing a proper set of training and guidance for the new employee(s) will help them understand the responsibilities at a deeper level. Provide them with a list of relevant resources and document their approach and what they eachieved so far to help their successors. Scribe top tip: Create step-by-step guides for newcomers on any task or process with Scribe. Use the screenshot Chrome extension to auto-generate how-to guides in seconds. 5. Key Contacts and Stakeholders Every individual associated with a role or a project, task, or role, with their contact information. Make sure you mention the delivery channels for accountability and a smooth flow of information. Add all the team members' contact information and their positions in the handover document depends upon whether your employee is leaving a role or transferring a project, heres a step-by-step guide for building your own handover reports from scratch. 1. Create a Handover Action Plan Before creating handover documentation, develop an action plan so you don't miss out on any critical details. Talk to your project manager about the ongoing projects. You don't want to leave any loose ends and ensure every task is delegated. Use these question prompts to make a foolproof action plan: What are the key responsibility areas (KRAs) in this transition? Who will be involved in creating the handover plan? Are there any guidelines to follow? Check out our free business action plan template 2. Define Project Goals, Expectations & Metrics While creating a detailed plan: Clearly define the project's end goals. Specify deadlines, measuring units, and risks involved. Mention expectations from stakeholders regarding tasks completion within deadlines. Involve all key stakeholders in a handover meeting to discuss these elements. This will help keep everyone on the same page when the knowledge handover occurs. 3. Identify Key Stakeholders Involved in the Project Identify key stakeholders for every task to ensure you don't miss out on handling over the duties to all the personnel responsible. List the people currently handling a particular role and those handling it once the project is transferred. 4. Document the Deliverables, Milestones & Timelines Handover documents should have specific timelines and important milestones, like due dates, meetings and other forms of communication. This is important for ensuring that nothing goes off course and the project moves forward as it would have. Use a project management tool like Notion, ClickUp or Asana to track and assign project deadlines and even automate handoffs. 5. Consider Potential Risks & Roadblocks like: Lacking a certain skillset or area of expertise. Trouble bringing stakeholders together Bottlenecks. Necessary approvals. Add your inputs in the comments section and suggestions on how employees can handle the situation. 6. Compile Training Resources and Guides for any process the employee goes through. This should include: A task overview. A step-by-step breakdown. Annotated screenshots or illustrations for each step. A list of needed resources. Use a documentation app like Scribe to quickly generate visual guides you can link or embed in your handover documentation app like Scribe to quickly generate visual guides you can link or embed in your handover documentation. complete with annotated screenshots and text. Once you have your process guides, use Pages to combine multiple guides and ask the AI to write project documentation, training materials or handover documentation for you. You can share your guide in multiple formats, such ask the AI to write project documentation, training materials or handover documentation for you. PDF, markdown or HTML. Use the Scribe platform to distribute your guide into preferred platforms for seamless integration. 7. Transfer Ownership of All Resources & Knowledge Once you have prepared all the handover documents, manuals and SOPs, its time to transfer the ownership of these resources. Send a list of accounts and credentials for login. You can also transfer the accessibility for app accounts, guides and documentation via Google Drive and Jira. By documenting everything needed in the handover, you can confirm that your departing employee won't keep access to vital logins or information. Make sure
to use a standard format and knowledge base with clearance permissions to maintain your document security. Scribe tip: Use a knowledge-base Chrome extension to cut the time you need to build your knowledge base. Conclusion: Handover Documentation Templates Transferring a project or a role comes with inevitable challenges like knowledge loss, communication gaps, problems in tracking changes and insufficient information, among others. In such scenarios, employees will take longer than usual to get started. That's where work handover documents come in. They're critical for every organization to ensure a smooth handover documents come in. They're critical for every organization to ensure a smooth handover documents come in. They're critical for every organization to ensure a smooth handover documents come in. project manager looking to transfer tasks or onboard employees. Use this set of handover document templates to create effective handover document templates to create effectiv report to higher authorities and following handover templates can assist you with a great deal in this regard. basically handover report is a document prepared by an employee or worker of the company to provide details and info about transferring of rights, duties and documents of a particular position or job to another employee or worker that will handle the job affairs in future permanently or for definite time period, Handover report is one of the important business report written by an employee who is about to leave the company or going to take part in a professional training program. Process of handover report includes transferring of position, rights, duties, important confidential documents and other data to another selected employee and providing details about the whole procedure in writing. According to policies and rules of various companies and organizations, an employee cannot leave the company legally or cannot go for long leave without submitting a handover report to the manager or higher authorities. Handover reports are also written by project managers when it comes to transfer the project to another project to another project to another project manager or company. According to experts, you should summarize all your tasks, responsibilities and duties as succinctly as possible in easy to understand format when writing a handover report. Internet is full with instructions and guidance to write an according to experts, you should summarize all your tasks, responsibilities and duties as succinctly as possible in easy to understand format when writing a handover report. handover report but if you need a readymade handover template or format to lessen your efforts then you are advised to use our handover template will not only save your time but will also increase your productivity while doing so. Download Free Handover templates created by experts and professionals. Getting help from the handover templates created by experts and professionals. Templates You may need to write a handover report after getting notice of transferring your current position to another employee of the company or staff member and you can use a handover report template to accomplish this task with best. We have gathered some best quality handover templates to help promoted or retired employees and workers while writing handover reports. Purpose of this report is to provide all essential details about transfer of job responsibilities, duties, documents to give hold of the job or position to another person according to the order of company or employer. A well written handover report will serve as a comprehensive guideline for the new employee to complete job tasks according to the standards of the company or employee to write the report when he or she is going for long vacation. In this situation, the company will arrange another alternative employee to handle the various job affairs and the current employee will educate and inform on what and how the new worker or employee will need to do in order to carry out the job successfully without making mistakes. After doing this, he or she will be liable to prepare a handover report to the management to get leave of absence properly. You can find large number of ready made formats and templates to write handover report with best but if you dont want to waste your time on searching over the web so simply have a look at shown below handover report templates and pick up an appropriate one to start writing the error free and professional looking report. Use of a template will give you a good start and will also save your time and efforts at ones. Handover Report Templates Are Here link to PHP Website Templates link to Dragon Logo Designs This Handover to do list template from iNet Click, can be used as a visual reminder, a way of prioritising tasks and scheduling everything that needs to be done so deadlines are not missed. How To Use The Handover Effectively? A carefully planned and written Handover to do checklist will help the user maintain consistency and good practices in a very easy and convenient way. It can also help you to save resources and energy. Here are some things to consider when using Handover checklist such as a Handover checklist template must be clearly established and include all aspects that may provide data of interest to the organization. An effective Handover to do list template must establish clearly what has to be checked, what is the criterion of compliance or non-conformity and the frequency of control or check. It should have a section of observations to provide additional information. If you are using your Handover to do checklist often then it can also be used to obtain data or to control the evolution of a characteristic or activity. The Advantages Of Using Handover Checklist 1. Using a Handover to do checklist lets you to get more done Anyone who have used a checklist such as this Handover to do list. Once you have that good feeling, it is no wonder, you are most likely to keep doing it, till all the tasks are completed. Did you know that that the people who use task list templates get an endorphin rush whenever he or she cross something off of a checklist? Thats why checklists are popular amongst people who use task list templates get an endover checklist Instead of going through your day trying to remember what you have to do, easily download our Handover checklist in pdf or excel and start ticking the tasks off on your task list template. By having a clear picture of a list of things you have to get done, instead of trying to remember it all, is definitely going to save you a ton of time and, yes, brain power! 3. Make delegating easier with a Handoverchecklist When it is easy to view the list of tasks to do, it also helps you to hand over a certain, if not all, the tasks things over to someone else who is suitable to handle the allocated tasks. If you need to instruct someone else who is suitable to handle the allocated tasks things over to someone else who is suitable to handle the allocated tasks. Handover to do checklist in front of you will help delegating a great deal easier. 4. Reach your goals quicker with Handover checklist template Setting deadlines for each tasks on Handover checklist in pdf or excel format will help you to reach those goals quicker. When you learn to break down your goals into bite-sized pieces with the help of a Handover in excel or pdf or word format, and add those pieces to your checklists like Handover checklist template is that they are easy to create or click on the download Handover to do checklist in pdf button on this page to get your free Handover checklist template must be clear and succinct, which will be easy for the people who will work with your free Handover checklist template. How To Make An Effective Handover checklist template must be clear and succinct, which will be easy for the people who will work with your free Handover checklist template. Handover. Organise the task items by category as it will allow you to navigate easily between the different sections within the Handover checklist template must be easy to understand and use. By having simple steps that reminds the user, in a ensure continuity, accountability and clarity when a project transitions from one team to another. Whether the shift involves internal departments or an external contractor, documenting the handover reduces the risk of miscommunication and incomplete work. Download this free Excel-based project handover template for a simple yet effective way to capture all the necessary details for a smooth transition. It helps teams align on responsibilities, track project stays on course despite a change in hands. Project stays on course despite a change in hands.
Project stays on course despite a change in hands. Project stays on course despite a change in hands. Project stays on course despite a change in hands. Project stays on course despite a change in hands. Project stays on course despite a change in hands. Project stays on course despite a change in hands. Project stays on course despite a change in hands. Project stays on course despite a change in hands. Project stays on course despite a change in hands. Project stays on course despite a change in hands. without a structured process in place. This template acts as a bridge between the outgoing and incoming teams by clearly documenting the current status of the project. It highlights what been completed, what tasks are still underway and what responsibilities are being transferred. It also provides high-level overviews of cost performance and timelines, giving the receiving team valuable context. By keeping the big picture in focus while also detailing operational handoffs, the template helps avoid duplication of work or missed deadlines. Because its built in Excel, its accessible and customizable, making it easier for teams to adopt and adapt based on project complexity and organizational handoffs, the template helps avoid duplication of work or missed deadlines. needs. A project handover template also helps create a Gantt chart by providing structured details about final deliverables, responsibilities, timelines and post-project activitiescritical elements that can be visually mapped in a timeline-based project plan. The best Gantt chart by providing structured details about final deliverables, responsibilities, timelines and found in online project management software. Streamline Project Handovers with ProjectManagerProjectManager is award-winning project and portfolio management software with robust Gantt charts that clarify final deliverables and final checks. It has various project views, including the Gantt, sheet, list, board and calendar, to improve project handovers. Set a baseline on the Gantt chart to track the project handover process in real timeTransform data into customizable reports and dashboards to avoid bottlenecksUse free guest licenses to keep vendors and stakeholders aware of project transitions. Try it freeProjectManagers Gantt charts help with project handover. Learn moreWhen to Use This Project Handover TemplateUse this template when a project changes hands mid-stream, during staff transitions or at the end of a project phase. Its especially helpful when external vendors finish their scope of work, when internal teams rotate responsibilities or when moving from planning into execution. Anytime project ownership shiftswhether due to phase completion, personnel turnover or departmental handoffsthis template? This template? This template is ideal for project managers, coordinators and team leads responsible for managing transitions between teams. Its also useful for consultants, contractors and department heads who oversee different project phases and need to ensure continuity. Whether youre working in construction, IT, marketing or operations, this handover template helps capture key project information and reduces disruption during personnel or phase changes. Anyone involved in multi-stage projects or cross-functional teams can benefit from using it. How to Use This Project Handover Template Using this project handover template is simple and intuitive. Each section is designed to guide you through the most critical elements of a successful transition. Below is a step-by-step breakdown of how to fill it out effectively.1. Enter General Information About the ProjectThe first step is to enter basic but essential details about the project. This includes the planned start and end dates, the main objectives and a summary of the project. This includes the planned start and end dates, the main objectives and a summary of the project. This includes the planned start and end dates, the main objectives and a summary of the project. sections. Setting the stage with clear project information helps align expectations and ensures everyone understands what the project is aiming to accomplish and by when.2. Identify Roles and Responsibilities from the Former and Transitioning TeamThe next step is to document who was involved in the project before the transition and who will be taking over moving forward. In the table titled Former Project Team, you can list each team members name, a brief role description, their responsibilities and contact information. This allows the new team to know who to reach out to for specific insights or follow-ups. Repeat the process for the transitioning team. Identifying all parties involved helps establish accountability, minimizes confusion and ensures continuity in roles and duties throughout the transition. 3. Define the Procurement method is the strategy used to acquire goods, services or works required for the project. This might include direct contracting, competitive bidding or framework agreements. Documenting the selected method provides transparency, ensures alignment with internal policies and helps the receiving team understand how suppliers and contractors were chosen. Its a key step in keeping procurement structured and predictable. 4. Describe the Work It also acts as a performance record, helping the next team understand what has worked well and where challenges may have occurred. This historical context is vital for informed decision-making and for maintaining project momentum. 5. Describe the Work in Progress and Upcoming Work to Be Completed Finally, its important to describe the work in Progress and Upcoming Work to Be Completed Finally, its important to describe the work in Progress and Upcoming Work to Be Completed Finally, its important to describe the work in Progress and Upcoming Work to Be Completed Finally, its important to describe the work in Progress and Upcoming Work to Be Completed Finally, its important to describe the work in Progress and Upcoming Work to Be Completed Finally, its important to describe the work in Progress and Upcoming Work to Be Completed Finally, its important to describe the work in Progress and Upcoming Work to Be Completed Finally, its important to describe the work in Progress and Upcoming Work to Be Completed Finally, its important to describe the work in Progress and Upcoming Work to Be Completed Finally, its important to describe the work in Progress and Upcoming Work to Be Completed Finally, its important to describe the work in Progress and Upcoming Work to Be Completed Finally, its important to describe the Work in Progress and Upcoming Work to Be Completed Finally, its important to describe the Work in Progress and Upcoming Work to Be Completed Finally, its important to the Work in Progress and Upcoming Work to Be Completed Finally, its important to the Work in Progress and Upcoming Work to Be Completed Finally, its important to the Work in Progress and Upcoming Work in Progress and Upco that is still ongoing and what remains to be completed. Use the Tasks section to list current assignments, any dependencies that might affect them and their current status. Youll also want to include planned start and expected completion dates. The deliverables section lets you track outputs still in progress or planned, along with their expected (AC) incurred to date, the estimate to complete (ETC) and the budget at completion (BAC). These four elements help establish a financial baseline that the former and transitioning teams can reference. Entering this information ensures visibility over how the project is tracking financially, which is crucial during any transition. It helps identify whether the project is on budget, where cost overruns may have occurred and what funding remains. Including both actual and forecasted figures gives the incoming team the context they need to plan, avoid surprises and manage remaining expenditures effectively. This section brings transparency and accountability into the projects financial performance and is essential for teams to stay aligned as responsibilities shift.7. Enter Project Timeline data. In this section, enter the planned start date, actual start date, planned completion date and actual completion date. This allows the former and transitioning teams to assess how the schedule has evolved. The schedule variancecalculated as the difference between planned and actual completion datesgives a quick insight into whether the project is ahead, behind, or on schedule. Capturing these dates is essential for transparency and effective planning. It helps the incoming team understand if any delays have occurred. and if so. how they might impact the remaining work. It also provides context for any adjustments that may need to be made moving forward. By including timeline information, teams gain a shared understanding of project pacing, helping them better manage expectations and delivery milestones during the transition. Kelated Project Management TemplatesA project handover template could be part of the final stage of a project, a transition to another team or project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager, or it could even be
the restart of a project manager, or it could even be the restart of a project manager, or it could even be the restart of a project manager of a project manager. over 100 free project management templates for Excel and Word that can be downloaded from our site. Project Closure Template Download this free project closure template for Word to formally complete and wrap up a project. It ensures that all deliverables have been completed, stakeholders are satisfied, documentation is finalized and lessons learned are recorded. The template acts as a checklist and report to verify that nothing is left unfinished as the project transitions out of the active phase. Transitions out of the active phase. Transitions out of the active phase are transitions out of the active phase. Transitions out of the active phase are transitions out of the active phase. Transitions out of the active phase are transitions out of the active phase. Transitions out of the active phase are transitions out of the active phase. Transitions out of the active phase are transitions out of the active phase are transitions out of the active phase. Transitions out of the active phase are transitions out of the active phase are transitions out of the active phase. Transitions out of the active phase are transitions of the active phase are transitions of the active phase are transitions of the active phase are teams, departments, vendors or individuals. It ensures that the handover process is smooth, coordinated and minimizes disruption. Project Plan Template A project plan is a document that helps project plan is a document that helps project plan and execute a project. This free project plan template for Word serves as a blueprint for project execution, monitoring and control, ensuring that all team members and stakeholders are aligned from start to finish. How to Manage Projects With Project Manager Whether starting, transitioning or ending a project, templates are not efficient at managing the dynamic properties of project management. Thats why project management software was developed. Project Management views that allow for flexibility. Use Gantt charts, kanban boards, task lists or calendar views, all of which are collaborative and update live data to keep everyone on the same page. Automated workflows add efficiency and task approval settings keep deliverables meeting quality standards. Track Resources and Stay Productive Efficient use of resources and monitoring them as executed helps to keep projects on track. Resources are scheduled on Gantt charts and assigned to team members, whose availability, pay rate and skills are set when onboarding. This leads to better resource allocation. To view resource allocation across one or all projects, use the color-coded workload chart. It shows who is overallocated or underutilized, and their workload can be balanced from the chart to keep everyone working at capacity without threatening burnout. A team page summarizes activities on a daily or weekly basis. It can be filtered by priority or progress and tasks updated from that page when needed. Monitor Project Metrics With Real-Time Dashboards and ReportsTo ensure project or portfolio dashboards. The portfolio summary dashboard, for example, is an easy way to collect status updates on cost. time, workload, budget, team progress and more. You can even access live notifications as team members tag you in comments. Customizable reports go deeper into status, variance, workload, timesheets and more. They can each be filtered to show key data points or provide a progress report to keep stakeholders informed. Secure timesheets help too by tracking labor costs that can help keep project management process. For those who want to widen the lens, below are some more recent articles weve published on our blog. Read about project management tools and techniques, the review process and much more. Project management tools and techniques, the review process and much more management tools and techniques, the review process and much more. and stay updated with email and in-app notifications. Join teams at Avis, Nestle and Siemens who use our software to deliver successful projects. Get started with ProjectManager today for free. HomeTemplatesHandoversHan teamwork! Simplify handovers, leaving no room for miscommunication or missed details. Designed for efficiency and collaboration, this template empowers your team to excel. From one shift to the next, ensure a smooth journey with our Handover Task Template. Handovers made easy! No Attribution requiredInstant Download, 100% CustomisableLifetime commercial licenseCancel anytimeGet access to entire sitePremium supportAlready a member?Sign inMicrosoft Excel, Google SheetsUnlimited DownloadsFrom -/monthDownload Now