

Handover Checklist (When someone is away or leaving)

A practical checklist to reduce disruption when key people are unavailable.

Handover details

Person handing over	Person receiving	Dates covered	Reason

Critical handover items (tick off)

- Current priorities and deadlines (top 5)
- Active jobs/projects status and next steps
- Customer issues/risks to watch
- Quotes outstanding + follow-ups required
- Supplier orders and delivery dates
- Cashflow risks (overdue debtors, bills due)
- Passwords/access (use your secure method)
- Key documents and where they are stored
- Who to contact for what (internal/external)
- Daily/weekly routines that must continue

Active work list

Item/job	Status	Next action	Owner	Due