[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Role Handover Form

Preventing knowledge loss when someone moves on: live tasks, contacts, passwords (via secure handoff), and deadlines, all documented.

Role summary Role: _____ **Outgoing holder:** _____

Successor: _____ **Handover start date:** _____

Last working day: _____ **Role purpose:** _____

Main outputs: _____ **Daily rhythm:** _____

Weekly rhythm: _____ **Monthly rhythm:** _____

Quarterly rhythm: _____ **Seasonal peaks, with dates:** _____ **Live tasks and deadlines**

Task	Due	Status	Contact if stuck
Example: Monthly supplier payment run	05 Jun 2026	Invoices collected, awaiting approval	Finance Manager
Example: Office lease renewal review	30 Jun 2026	Quotes requested from two agents	Office Manager

Key contacts and stakeholders

Contact	Role	Contact for
Example: **[Role contact name]**	Building manager	Access, maintenance, alarm faults
Example: **[Role contact name]**	IT support lead	System outages, new accounts

Systems and access Passwords are never written in this form. Access transfers happen through IT or the system owner, and the outgoing holder's access is removed on their last day.

System	Access level	How access transfers
Example: HR system	Administrator	Manager requests transfer; never share your password
Example: Shared drive	Editor, Operations folder	IT adds the successor to the group

Handover meetings

Meeting	Date	Items covered
Meeting 1 - walk through live tasks and contacts		
Meeting 2 - successor shadows the key recurring tasks		
Meeting 3 - confirm outstanding items and owners		

Completion checklist **[ ]** All tasks due within 30 days are listed with status and a contact.

[ ] No passwords are written in this form; access transfers are requested through IT.

[ ] Three handover meetings happened and outstanding items have owners.

Document: Role Handover Form **Prepared by:** _____

Owner: _____ **Version: 2.0 (redesign wave 1)**

[Company name]

Date: _____ **Review date:** _____