

WORKFLOW HANDOFF AUDIT SHEET

A handover is a decision point.

Use this sheet to make the next action, owner and evidence clear before work moves on.

HOW TO USE IT

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|-----------|-------------------------------|--|
| 01 | Name the handoff | Describe the work moving, not the whole project. |
| 02 | Identify the decision | State what the next owner must decide or do. |
| 03 | Record the evidence | Link or name the source that supports the move. |
| 04 | Make an owner explicit | One person or role accepts the next action. |
| 05 | Plan the exception | Write what happens when the normal path fails. |

SET-UP

WORKFLOW OR PROCESS

AUDIT DATE

AUDIT OWNER

REVIEW POINT

A USEFUL HANDOFF HAS

☐ A named trigger ☐ A next owner ☐ A clear decision ☐ A source of truth ☐ An exception path

Start with one handoff that creates repeat questions, rework or waiting.

The audit pages help you see whether the route is ready to move without hidden assumptions.

HANDOFF AUDIT LOG

Audit the handoff, then decide what makes it safe to move.

Use one row per transfer of work, information or decision. Add a continuation page if required.

HANDOFF / TRIGGER	NEXT OWNER	DECISION OR ACTION	SOURCE OF TRUTH	EXCEPTION / REVIEW
01				
02				
03				
04				
05				

REVIEW PROMPT

Can the next owner act without chasing context, guessing the decision, or relying on a private message?

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DECISION AND FOLLOW-THROUGH

Choose the next improvement.

Use the audit evidence to make one practical change before you add more process.

MOST EXPENSIVE UNCLEAR HANDOFF

WHAT MAKES IT UNCLEAR

SMALLEST USEFUL CHANGE

OWNER AND REVIEW DATE

EVIDENCE THAT THE CHANGE WORKED

Practical action: make the next handoff easier to accept, review and recover.