

Cross-department handoff checklist

Agree one repeatable handoff between a sending team and a receiving team.

Workflow / handoff

Sending / receiving owner

☐**Agree the outcome**

Define the final output and who accepts it.

☐**Name the process owner**

Identify the end-to-end owner and the decision-maker at each handoff.

☐**Set minimum inputs**

List required fields, documents and quality checks before transfer.

☐**Define acceptance**

Agree how the receiving team accepts, rejects or returns incomplete work.

☐**Choose the authoritative record**

Name the system and status that both teams will use.

☐**Document exceptions**

Set escalation owners and response expectations for unusual cases.

☐**Pilot with both teams**

Use real representative work; train the people who perform the steps.

☐**Review and maintain the standard**

Measure rework and delays, assign version ownership and a review date.

MAKE THE NEXT DECISION

Next decision: approve the pilot, revise the handoff agreement, or resolve ownership before standardizing further.

What must accompany the handoff, who accepts it, and what happens if it is incomplete?