Service Business Handoff Worksheet

Use one worksheet for one job or recurring handoff. The sender prepares the record; the receiving owner checks it before the next stage starts. Keep confirmed facts separate from assumptions.

01 Identify the job and owners

Job / reference

Customer / site

From stage / sender

To stage / receiving owner

Handoff date / time

Current job record / document location

02 Check readiness

Check one status per row. Record open items on page 2.	Ready	Open	N/A
Customer and authority Contact, job location, and decision-maker are recorded.	☐	☐	☐
Scope and exclusions Current scope, exclusions, and document version are clear.	☐	☐	☐
Customer commitments Timing, access, communication, and deliverables are recorded.	☐	☐	☐
Resources and prerequisites Materials, staffing, equipment, and start conditions are checked.	☐	☐	☐
Facts and assumptions Confirmed dates and decisions are distinct from preferences.	☐	☐	☐
Open questions and escalation Each gap has an owner, due date, and escalation contact.	☐	☐	☐
Shared record and updates The receiving team can find the latest scope and decisions.	☐	☐	☐

03 Record acceptance

☐ Ready to proceed ☐ Proceed with conditions ☐ Hold / return

Next permitted action / conditions or blockers

Receiving owner / checked at

Escalation contact / review date

Handoff and Change Log

Use this page to keep transfers, revisions, and unresolved questions with the same job record. For each change, identify the source, decision-maker, and receiving owner.

Job / reference

Record owner

04 Log transfers and material changes

Date / time From -> to	Transfer or change Scope / version / approval	Receiving owner Acknowledged at	Next action Owner / due

Use the source document or approval reference; do not rely on a separate message thread.

05 Assign unresolved questions

Question / missing information	Owner / escalation	Needed by / status

06 Review a short trial

Handoffs reviewed: _____ Accepted without clarification: _____

Waiting for missing information (hours): _____ Jobs delayed by missing commitments: ___

Checklist change / owner / next review: _____

Companion article: jayzaabri.com/operating-handoffs-service-businesses/
Author and media resources: jayzaabri.com/media-kit/