

Project handover checklist

Twelve things the next person needs when a project changes hands. Tick them off here, copy them into a document, or download the template. No email address needed.

The checklist

- ☐ 1. Goal and current state: what the project is for and where it stands today, in three sentences.
- ☐ 2. New owner: who owns it from today, and until when the previous owner can still answer questions.
- ☐ 3. Deadlines and milestones: every date that matters, written as a date, not as “next week”.
- ☐ 4. Decisions already made: what was agreed, who agreed it, and why, so nobody reopens it.
- ☐ 5. Open questions and blockers: what is still undecided and who is waiting on whom.
- ☐ 6. Key people: client contacts, who signs off, and who on your side does what.
- ☐ 7. Contract, budget and scope: the contract number, what is in scope and what needs a change request.
- ☐ 8. Files: only the final versions, each with one line saying what it is.
- ☐ 9. Access: folders, tools and channels the new owner needs. Ask for access; never paste passwords.
- ☐ 10. Unwritten promises: anything you told the client that is not in an email or a contract.
- ☐ 11. Risks: what could go wrong next, and the early sign to watch for.
- ☐ 12. Next step and confirmation: the very next action, and how the new owner confirms they have taken over.

A filled-in example

Goal: run the Nordlit launch. The kick-off agenda is drafted and the client notes are summarised.

New owner: James from today; Mark answers questions until Friday.

Deadlines: kick-off Fri 16 Oct; launch plan approved by the end of October.

Decisions: the scope in launch-brief.pdf is agreed with the client.

Open: which markets come second; the press date.

People: Lina K., CFO, decides at Nordlit; Rachel handles the contract.

Contract and budget: contract No. 2026-118; budget €12,400 (changed from €12,000 by Rachel).

Files: launch-brief.pdf, contract.pdf (final versions).

Access: the Nordlit space in Colle and the shared drive folder.

Unwritten promises: a short status note to the client every Friday.

Risks: the press date slips if the second markets are not chosen by the 30th.

Next step: send the agenda to the client by Wednesday; James accepts the handoff to confirm.

Or hand it off in one sentence

With Colle you tell Claude or ChatGPT “send this to James, he runs the launch now”. The summary, the facts (deadline, budget, who decides) and the files arrive in James’s own assistant, and the case keeps them for whoever comes next. <https://www.trycolle.com>