

The Owner's Handoff Sheet

WORKSHEET / Start with the essentials

Fill in a form-capable PDF reader or print and write. Use a separate copy for each job or assignment.

What work are you handing over?

One assignment, process, or recurring responsibility.

Who owns the result?

Name one accountable person or role, even if others help.

What does done well look like?

Use observable outcomes, not just Do your best.

When must it be done?

A deadline, shift milestone, or recurring schedule.

What can the owner decide without asking?

State permitted decisions and any spending or scope limits.

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WORKSHEET / Finish the boundaries and supporting details

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When should they stop and escalate? To whom?

Name the trigger, contact role, and action while waiting.

When and how will you check progress?

Agree a checkpoint and reporting channel; avoid constant interruptions.

What confirms completion?

A walkthrough, record, photo where appropriate, or agreed acceptance check.

Resources and support available (optional)

People, instructions, equipment, access, or approved budget.

Who receives the completion update? (optional)

Name the person or role and channel.

Why this matters / acknowledgment (optional)

Explain the purpose and confirm the owner understands the assignment.

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WORKED EXAMPLE / Adapt to the real work

Illustrative example only. Use the actual conditions, team, and agreed requirements.

What work are you handing over?

Own the dining-room opening check

Who owns the result?

Opening shift manager

What does done well look like?

Dining room, restrooms, entry, and service stations are checked against the current opening checklist. Defects have an owner and next action before opening.

When must it be done?

Complete the check 20 minutes before doors open, every opening shift.

What can the owner decide without asking?

Reassign opening tasks within the scheduled team and use approved supplies. No unapproved purchases or changes to required safety procedures.

When should they stop and escalate? To whom?

For an unresolved safety concern, missing critical supplies, or a problem that could delay opening, contact the general manager immediately. Keep the affected area out of use until direction is given.

When and how will you check progress?

Send a short exception update 30 minutes before opening if any item is at risk.

What confirms completion?

Completed dated checklist and walkthrough; each unresolved item lists the issue, responsible person, and next action.

Resources and support available

Current opening checklist, scheduled team, approved supplies, and general manager contact.

Who receives the completion update?

General manager via the agreed shift channel

Why this matters / acknowledgment

A consistent opening is part of the guest experience. Confirm the manager understands the checklist and escalation boundary.

This worksheet supports operational handoffs. It does not replace required training, safety procedures, or company approvals.