Hand Off a Task Without Taking It Back

Use this before you send a handoff, so the person can move the work forward without coming back to you to ask.

Who it's for: Owners handing work to an employee or contractor, like a class change at a studio, a special order at a shop, or a job at a trades business. Use it any time you hand off a task you want someone else to move forward.

Before you send it

What's ready

- [ ] Describe the task in one sentence, including what "done" looks like.
- [ ] Attach or link everything they need to start today.

What's missing

- [ ] List anything that isn't ready yet, who's getting it, and when.
- [ ] Note any decision you still owe them, and when you'll make it.

Where the latest information lives

- [ ] Point to the one place they'll find the current version.
- [ ] Label or remove old versions so there's only one to choose from.

Who owns the next step

- [ ] Name who does the next step.
- [ ] Say what they can decide without checking with you.

When to follow up

- [ ] Set a due date for the finished work.
- [ ] Pick a check-in time and put it on your calendar.
- [ ] Agree on how they'll confirm it's done.
- [ ] Ask what their first step will be.

Your handoff note

Task: _____

Done means: _____

Ready now: _____

Still missing: _____ **Coming from:** _____ **By:** _____

Latest version is here: _____

You own: _____

You can decide: _____

Due by: _____ **Check-in:** _____

How to confirm it's done: _____

Example: a yoga studio rescheduling a class

Task: Move Thursday's 6 PM flow class to Friday at 6 PM.

Done means: Friday shows in the booking system, and every registered student has been notified.

Ready now: The room is free Friday, and the instructor has confirmed.

Still missing: The door sign. **Coming from:** Me. **By:** Wednesday at noon.

Latest version is here: The schedule in the booking system. The printed one at the desk is out of date.

You own: Updating the booking, messaging students, and answering replies.

You can decide: Which class to offer anyone who can't make Friday.

Due by: Wednesday at 6 PM. **Check-in:** Wednesday at 3 PM.

How to confirm it's done: Reply to this message and say whether every registered student was notified. List any replies that still need an answer.