AGENCY OPERATIONS

Internal project handoff checklist

A handoff checklist for moving responsibility without losing the client history, scope, files, risks, or next commitments.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

A project owner is changing mid-engagement.

WORK THROUGH THE CHECKLIST

- [ ] 01 **Summarize client context**
- [ ] 02 **Review scope and milestones**
- [ ] 03 **List open decisions**
- [ ] 04 **Transfer files and access**
- [ ] 05 **Introduce the new owner**
- [ ] 06 **Confirm the next client touchpoint**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.