AGENCY OPERATIONS

Role handover plan

A role transition plan for protecting client service when someone joins, changes responsibilities, or leaves a team.

A practical worksheet from Stelaah

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

HOW TO USE THIS

A role change could create gaps in client knowledge or delivery.

WORK THROUGH THE CHECKLIST

- [ ] 01 **List recurring responsibilities**
- [ ] 02 **Map client relationships**
- [ ] 03 **Transfer access safely**
- [ ] 04 **Document current risks**
- [ ] 05 **Schedule overlap**
- [ ] 06 **Confirm the new owner**

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.