Ashford Business Services Ltd

Role Handover Form

Preventing knowledge loss when someone moves on: live tasks, contacts, passwords (via secure handoff), and deadlines, all documented.

Role summary

Field	Entry
Role	**Role title as agreed at the meeting.**
Outgoing holder	**Outgoing holder**
Successor	**Successor**
Handover start date	**9 November 2026**
Last working day	**Last working day**
Role purpose	
Main outputs	
Daily rhythm	
Weekly rhythm	
Monthly rhythm	
Quarterly rhythm	
Seasonal peaks, with dates	

Live tasks and deadlines

Task	Due	Status	Contact if stuck
Example: Monthly supplier payment run	05 Jun 2026	Invoices collected, awaiting approval	Finance Manager
Example: Office lease renewal review	30 Jun 2026	Quotes requested from two agents	Office Manager

Ashford Business Services Ltd

Task	Due	Status	Contact if stuck

Key contacts and stakeholders

Contact	Role	Contact for
Example: **Sarah Mitchell**	Building manager	Access, maintenance, alarm faults
Example: **Sarah Mitchell**	IT support lead	System outages, new accounts

Ashford Business Services Ltd

Systems and access

Passwords are never written in this form. Access transfers happen through IT or the system owner, and the outgoing holder's access is removed on their last day.

System	Access level	How access transfers
Example: HR system	Administrator	Manager requests transfer; never share your password
Example: Shared drive	Editor, Operations folder	IT adds the successor to the group

Handover meetings

Meeting	Date	Items covered
Meeting 1 - walk through live tasks and contacts		
Meeting 2 - successor shadows the key recurring tasks		
Meeting 3 - confirm outstanding items and owners		

Ashford Business Services Ltd

Completion checklist

✓	Check
	All tasks due within 30 days are listed with status and a contact.
	No passwords are written in this form; access transfers are requested through IT.
	Three handover meetings happened and outstanding items have owners.

Document	Role Handover Form
Prepared by	**James Patel, Office Manager**
Owner	**Emma Clarke, Finance Manager**
Version	2.0 (redesign wave 1)
Date	**9 November 2026**
Review date	**9 November 2026**