

Client-context handover

Prepare current context and test a colleague's ability to use it.

A handover record with sources and pending decisions

A map of authority and escalation

A completed account-meeting example

A free worksheet from ailevrg.com/guides/knowledge-transfer

Choose the actual job being covered. Ask the recipient to use the record while the current owner is still available.

01 Cover

Client, job and cover dates

Current owner and recipient

Useful result required

Recipient's decision authority

02 Context

Current agreement and source

Goals and approved recent decisions

Open issues and decision owners

Upcoming work and dependencies

03 Evidence and access

Validity and collection dates

Missing or contradictory information

Required access confirmed

Escalation and support contacts

04 Practice

Task the recipient practised

Sources used and questions remaining

Corrections before the cover begins

How new decisions return to the records

An invented account-meeting handover

Invented teaching example. No client outcome is claimed.

Job

A colleague prepares and attends one account meeting.

Context

Current agreement, approved goals, recent decision log and two open issues.

Authority

The colleague may explain current work; a scope change goes to the account owner.

Practice

The colleague prepares a brief and identifies an open issue with no confirmed decision.

Update

Approved meeting decisions update the decision log with their source and validity date.