



General Project Handover Template

19 Oct 2023

Complete

Score	1 / 1 (100%)	Flagged items	0	Actions	1
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Client/Site Name

CY Manufacturing

Location

Los Angeles, CA, USA
(34.0549076, -118.242643)

Project Name

CYM Product Development

Project Manager Name (Outgoing)

Jay Steinfeld

Project Manager Name (Incoming)

Sharon Keys

Handover Date

19.10.2023 08:30 PST

Actions

1 action

Project Handover Details / Project Status and Progress

Outstanding Issues and Follow-Up Schedules

A minor supply chain delay is expected, with weekly updates to be provided until the issue is resolved. This, however, was anticipated and already taken into consideration from the previous week's ahead-of-time schedule.

Supplier A prompted our team of a slight delay on the production due to manpower concerns. This will be resolved before this weekend.

To do | Assignee SafetyCulture Staff | Priority Low | Due 20.10.2023 16:00 PST | Created by SafetyCulture Staff

Coordinate and ensure resolution of supplier concern before the weekend.

Project Overview

Project Purpose

The project aims to develop the CYM product line, targeting a 20% market share increase in the next fiscal year.

Key Stakeholders

Marketing Team: Contacted via weekly progress reports.
Engineering Team: Regular meetings held bi-weekly.
Sales Team: Monthly updates via email.
Legal Department: Legal compliance reports shared monthly.
Customer Support: Monthly progress meetings scheduled.

Documentation and Data Transfer

List of Project Documents

- Product Specifications: Housed in the "Product Specs" folder.
 - Design Plans: Located in the "Designs" folder.
 - Budget Reports: Archived in the "Budget" section.
 - Quality Control Documentation: Stored in the "Quality" folder.
 - Marketing Strategy: Available in the "Marketing" section.
-

Method of Document Organization

Documents are organized in a shared cloud storage folder, categorized by project phase and type.

Stakeholder Communication

Communication Plan

Weekly status meetings will be held for the first month of handover, followed by bi-weekly meetings with key stakeholders.

Stakeholder Contact List

Contact details for key stakeholders are available in the project directory.

Knowledge Transfer

Training Requirements

Incoming team members require training on the new product's features and technical aspects.

Knowledge Transfer Plan

Jay Steinfeld will conduct two training sessions per week for the first month, focusing on technical specifications, market positioning, and product benefits.

Roles and Responsibilities

Roles and Responsibilities 1

Employee Name Jay Steinfeld

Team/Department and Role Project Manager - Outgoing

Responsibilities

Overseeing project execution, resource allocation, and stakeholder communication.

Roles and Responsibilities 2

Employee Name Sharon Keys

Team/Department and Role Project Manager - Incoming

Responsibilities

Assume leadership of the project, manage the team, and ensure a successful product launch.

Roles and Responsibilities 3

Employee Name Patrick Knight

Team/Department and Role Lead Engineer

Responsibilities

- Overseeing the technical aspects of product development.
 - Collaborating with the design team to ensure product specifications are met.
 - Conducting quality control checks during the manufacturing phase.
-

Roles and Responsibilities 4

Employee Name Michael Brown

Team/Department and Role Marketing Specialist

Responsibilities

- Developing and implementing the marketing strategy for the CYM product line.
 - Conducting market research and competitor analysis.
 - Coordinating marketing campaigns and promotions.
-

Roles and Responsibilities 5

Employee Name Emily White

Responsibilities

- Managing the project budget and financial resources.
- Preparing financial reports and budget forecasts.
- Ensuring financial compliance with project expenditures.

Project Status and Progress

1 action

Handover Timeline

Week 1 (October 1 - October 7):

- Initial meeting between outgoing Project Manager and incoming Project Manager to discuss transition plans.
- Preliminary review of project status and documentation.

Week 2 (October 8 - October 14):

- Detailed handover plan development, outlining specific tasks and responsibilities.
- Identification of key stakeholders and communication plan preparation.

Week 3 (October 15 - October 21):

- Begin the transfer of critical project documentation, such as product specifications and design plans.
- Initiate knowledge transfer sessions with the incoming team to ensure a smooth transition.

Week 4 (October 22 - October 29):

- Continue knowledge transfer sessions and training for incoming team members.
- Conduct a comprehensive review of the project's financial status and budget reports.
- Finalize documentation transfer, ensuring all essential project documents are handed over.
- Confirm that the incoming team is fully prepared to take over project management responsibilities.

Project Status Update

The project is currently on track. All design phases are complete, and manufacturing is in progress as scheduled.

Outstanding Issues and Follow-Up Schedules

A minor supply chain delay is expected, with weekly updates to be provided until the issue is resolved. This, however, was anticipated and already taken into consideration from the previous week's ahead-of-time schedule.

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Technical Information

Technical Specifications

Detailed product specifications and design blueprints are documented in the project repository.

[CYM Manufacturing - Project Repository.pdf](#)

Access to Tools and Systems

Access credentials to design software (CAD) and project management tools have been shared.

Legal and Compliance Requirements

The project complies with all relevant industry standards and legal regulations.

Quality Control and Testing

1 / 1 (100%)

Quality Assurance Measures

Regular quality checks are performed during the manufacturing phase to ensure compliance with quality standards.

Compliance with Standards

Pass

The project has undergone a thorough review and successfully passed all applicable industry standards.

Dependencies and External Relationships

External Dependencies

The project's timeline relies on the timely delivery of components from Supplier A.

Dependency Management

Sharon Keys will maintain open communication with Supplier A to ensure timely deliveries.

Completion and Sign-Off

Lessons Learned

Team retrospectives have led to improved communication and efficiency, with a focus on enhancing collaboration.

Project Handover-Related Comments

The handover process has been exceptionally smooth, and the incoming team is well-prepared to take over seamlessly.

Project Handover Template-Related Suggestions

Consider incorporating a section for risk assessments and contingency plans in the template for future handovers.

Project Manager Name (Outgoing)



Jay Steinfeld
19.10.2023 09:22 PST

Project Manager Name (Incoming)



Sharon Keys
19.10.2023 09:24 PST

Media summary

[CYM Manufacturing - Project Repository.pdf](#)