

FREE RESOURCE · **THE CX CHECKPOINT, AUGUST EDITION**

The Handoff Checklist

Map your business's biggest handoffs and find exactly where work — and customers — are getting stuck.

The Handoff Rule

"Every time work moves from one person to another, there should be zero confusion about what, when, and how."

Where Handoffs Break

- Sales promises X — Ops delivers Y.
- Team A finishes their part — Team B doesn't know it's ready.
- You become the middleman for everything, because no one else has the full picture.

The Fix — Every Handoff Needs

WHAT	exactly what's being handed over.
WHEN	by what date or time.
HOW	what quality or standard looks like.

Example

- X Vague:** "Send the quote."
- ✓ Clear:** "Send branded quote PDF to client by 3pm. Use template v2."

Map Your Handoffs

This Week's Exercise

List your 3 biggest handoffs — the points where work moves between people or teams. For each one, write down what should be handed over, when it's due, and what “done right” looks like. Anywhere you're unsure, that's your gap.

#	HANDOFF	WHAT	WHEN	HOW
1				
2				
3				

Ready to Fix the Gaps?

This checklist shows you where work gets stuck. The training gets it moving.

COMING SEPTEMBER

Front Desk to Front Runner

A practical CX & operations training for teams who touch the customer — real scenarios, real tools, real confidence.

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