FIRNKERN · PRINTABLE TEMPLATE

Handover checklist: when the only person who knows leaves

For organisations of any size · works without software too · November 2026

1 Find single-person roles

- Ask one question per team: «What stops if this person is away for three months?»
- List roles only one person masters – small ones too (customs, payroll run, an old machine, a key customer).
- For each role note: who is leaving, and when (retirement, resignation, parental leave)?

2 Start early

- Start the handover months before the last day, not weeks.
- Name three people: the person leaving · the person who tests (the successor or, if there is none yet, someone from outside the role) · management, who confirms.
- Whoever takes notes during capture does not test later.

3 Capture at the workplace

- The person shows and explains how they really work – at the task, not in a meeting room.
- Record the exceptions: «unless …», «customer X is different».
- Contacts and relationships: who do they call when something is stuck?
- The yearly cycle: what happens only once a year (closing, overhaul, stocktake)?
- Access, tools, storage places – without writing passwords into the handover.

4 Test whether it holds

- The tester does the task using only what was handed over – while the experienced person is still there.
- Whatever goes wrong is the real gap list. Close the gaps and test again.
- Record honestly what cannot be handed over (intuition, hands-on skill, relationships) and how it continues (coaching, mentoring).

5 Confirm and afterwards

- Management confirms the handover – as a decision, not a hope.
- Agree whether the person can be reached for questions after leaving.
- Maintain the handover: who updates it when something changes?

Note

This checklist is free to use. Firnkern is software that supports this process (firnkern.com/en/) – but the checklist works on paper too. Firnkern GmbH (in formation), Riehen, Switzerland · marco@firnkern.com