

# How to Give and Receive an Effective Project Handoff

**Host:** Welcome back to *People, Process, Progress* podcast, the podcast dedicated to fostering pragmatic optimism in your professional world. Today, we're tackling a universal challenge: the art of the **good handoff**.

Whether you're a healthcare professional transitioning patient care, a software developer handing off a project, or simply passing the baton in any collaborative effort, a smooth handoff is crucial for success. So, let's dive in and explore some key elements for both **providing** and **receiving** a stellar handoff.

## Part 1: The Art of the Sender

**Host:** Imagine you're an emergency medical technician (EMT) rushing a patient to the hospital. As you arrive, you need to effectively hand off their care to the emergency room (ER) team. This handoff is **critical** for ensuring the patient receives seamless and efficient treatment.

Here are some key elements for **providing** a good handoff:

- 1. Update the documentation:** Just like with a patient's medical chart, ensure all project documentation is up to date.
  - a. This includes the latest status report, potential risks and known issues, % tasks complete, key milestone dates, go live dates (if planned already), review design documents, and any relevant communication tools.
- 2. Prepare your pitch:** When handing off a project, think of it like presenting a case to a new doctor. Briefly summarize the project's purpose, any roadblocks encountered, and next steps.
  - a. Before you meet with the oncoming PM, talk through it in your head. Be familiar with the latest status and any outstanding actions you or team members have open.
- 3. Review the data and status:** Just as you'd share a patient's vital signs and medical history, provide the recipient with a clear understanding of the project's current data, progress made, and any outstanding issues.
  - a. Now walk the receiver through the documentation to the level needed. Sometimes you need a lot, sometimes you need less. What are the guard rails of the project?
- 4. Share the intangibles:** Beyond the technical aspects, share any "institutional knowledge" you've gained about the project. This might include insights into stakeholder preferences, potential roadblocks, or even unofficial best practices.
  - a. What does the incoming PM need to know? Who is onboard? Who do we have opportunity to build better rapport with?

## Part 2: The Receiver's Responsibility

**Host:** Now, let's shift perspectives and imagine you're the ER doctor receiving the patient from the EMT. Your ability to effectively **receive** the handoff is just as crucial in ensuring the patient's well-being.

Here are some key elements for **receiving** a good handoff:

- 1. Switch on receiver mode:** Actively listen and engage with the sender. Ask clarifying questions and avoid distractions. Remember, this isn't the time to multitask or check your email.

- a. Listen to hear what's being shared, not to respond. A good model I learned while part of an Incident Management team is the CUDC method. This is, communicate (receive), understand the message, decide next steps, communicate (provide) direction.
- 2. **Familiarize yourself with the use case and base plan:** Just like understanding a patient's medical history, grasp the project's purpose, goals, and overall approach. This helps you understand the context and ask relevant questions.
  - a. These are the foundational reasons for a project. Like the first assessment a patient gets when at the doctor or while being treated on the streets. While a good baseline, this data and our perspective will change and adjust based on current circumstances.
- 3. **Ask objective questions:** Don't be afraid to ask questions but frame them objectively to seek clarification rather than judgment. This fosters a collaborative and open communication style.
  - a. While chatter and gossip happen, it's best to focus on the facts. Not in a robotic way, but in a way that will help the sender of the information feel comfortable with the handoff and help the receiver of the briefing be more prepared to support the team and the project.
- 4. **Start thinking ahead to next steps:** As you receive information, begin to mentally formulate a plan for moving forward. This demonstrates your engagement and proactiveness.
  - a. Now that you've heard the status, familiarized yourself with the concept of the project, asked good questions, it's time to think about next actions. Some actions I've found helpful include:
    - i. Setup 1:1 with the members of the project team to build relationships
      - 1. Ask what's working
      - 2. What we should keep
      - 3. What we should change
    - ii. Consider the timing of any changes you feel the project can benefit from
      - 1. Too much early seems like change for change's sake and can be disruptive to the team's flow
      - 2. Look for small opportunities to ask guiding questions
    - iii. Be the Project Manager you are, not the one that was there before you
      - 1. It's natural and helpful to lead and support the team as you feel best

**Host:** By following these elements, both senders and receivers can contribute to a smooth and successful handoff. Remember, a good handoff isn't just about passing information; it's about **transferring ownership, building trust,** and ultimately, **setting the project up for success.**

**Host:** Thanks for joining us on *People, Process, Progress*. We hope this episode equips you with the tools to navigate your next handoff with confidence and collaboration. Remember, a little planning goes a long way in ensuring a smooth transition and, ultimately, fostering a more hopeful project journey.

Stay safe, wash your hands, and Godspeed y'all,

Kevin



Thank you for choosing the **People, Process, Progress** podcast. I hope the plans in these episodes help you balance your life, mind, body, and spirit.

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