**PROJECT HANDOVER REPORT TEMPLATE**

GENERAL PROJECT INFORMATION

|  |  |  |
| --- | --- | --- |
| PROJECT NAME | PROJECT MANAGER | PROJECT SPONSOR |
|   |   |   |
| EMAIL | PHONE | ORGANIZATIONAL UNIT |
|   |  |   |
| GREEN BELTS ASSIGNED |   |   | EXPECTED START DATE | EXPECTED COMPLETION DATE |
|   |  |  |
| BLACK BELTS ASSIGNED |   |   | EXPECTED SAVINGS | ESTIMATED COSTS |
|   |  |  |

PROJECT OVERVIEW

|  |  |
| --- | --- |
| PROBLEM OR ISSUE  |   |
| PURPOSE OF PROJECT |   |
| BUSINESS CASE |   |
| GOALS / METRICS |   |
| EXPECTED DELIVERABLES |   |

PROJECT SCOPE

|  |  |
| --- | --- |
| WITHIN SCOPE |   |
| OUTSIDE OF SCOPE |   |

TENTATIVE SCHEDULE

|  |  |  |
| --- | --- | --- |
| **KEY MILESTONE** | **START** | **FINISH** |
| Form Project Team / Preliminary Review / Scope |  |  |
| Finalize Project Plan / Charter / Kick Off |  |  |
| Define Phase |  |  |
| Measurement Phase |  |  |
| Analysis Phase |  |  |
| Improvement Phase |  |  |
| Control Phase |  |  |
| Project Summary Report and Close Out |  |  |
|  |  |  |
|  |  |  |
|   |  |  |

RESOURCES

|  |  |
| --- | --- |
| PROJECT TEAM |   |
| SUPPORT RESOURCES |   |
| SPECIAL NEEDS |   |

COSTS

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **COST TYPE** | **VENDOR / LABOR NAMES** | **RATE** | **QTY** | **AMOUNT** |
| **Labor** |   |  |  |  |
| **Labor** |   |  |  |  |
| **Labor** |   |  |  |  |
| **Labor** |   |  |  |  |
| **Labor** |   |  |  |  |
| **Supplies** |   |  |  |  |
| **Miscellaneous** |   |  |  |  |
|   |   |   | TOTAL COSTS |   |

BENEFITS AND CUSTOMERS

|  |  |
| --- | --- |
| PROCESS OWNER |   |
| KEY STAKEHOLDERS |   |
| FINAL CUSTOMER |   |
| EXPECTED BENEFITS |   |

|  |  |  |
| --- | --- | --- |
| **TYPE OF BENEFIT** | **BASIS OF ESTIMATE** | **ESTIMATED BENEFIT AMOUNT** |
| **Specific Cost Savings** |   |  |
| **Enhanced Revenues** |   |  |
| **Higher Productivity (Soft)** |   |  |
| **Improved Compliance** |   |  |
| **Better Decision Making** |   |  |
| **Less Maintenance** |   |  |
| **Other Costs Avoided** |   |  |
|   |   |   | TOTAL BENEFIT |  |

RISKS, CONSTRAINTS, AND ASSUMPTIONS

|  |  |
| --- | --- |
| RISKS |   |
| CONSTRAINTS |   |
| ASSUMPTIONS |   |

|  |  |  |
| --- | --- | --- |
| PREPARED BY | TITLE | DATE |
|   |   |   |

|  |
| --- |
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