
Handover Note to Colleague

Date: June 18, 2024

To: John Smith

From: Jane Doe

Subject: Handover of Job Responsibilities

Dear John,

As I will be leaving my position at ABC Corporation on June 30, 2024, I am providing this handover note to ensure a smooth transition of my responsibilities to you. Below, I have outlined my key duties, ongoing projects, important contacts, and other critical information.

Current Responsibilities

1. Responsibility 1: Client Account Management

- **Description:** Managing and maintaining relationships with key clients.
- **Current Status:** Ongoing, with regular client meetings scheduled.
- **Next Steps:** Continue with scheduled meetings and address any client concerns promptly.
- **Relevant Contacts:** Sarah Lee (sarah.lee@abccorp.com), Tom White (tom.white@client.com)

2. Responsibility 2: Monthly Sales Reports

- **Description:** Compiling and analyzing monthly sales data.
- **Current Status:** Up-to-date, May report submitted.
- **Next Steps:** Prepare and submit the June sales report by July 5, 2024.
- **Relevant Contacts:** Kevin Brown (kevin.brown@abccorp.com)

3. Responsibility 3: Team Meetings Coordination

- **Description:** Scheduling and coordinating weekly team meetings.
-

- **Current Status:** Ongoing, next meeting scheduled for June 20, 2024.
- **Next Steps:** Ensure the meeting agenda is prepared and distributed to the team.
- **Relevant Contacts:** All team members (team@abccorp.com)

Ongoing Projects

1. Project Name 1: New Product Launch

- **Description:** Overseeing the launch of the new product line.
- **Key Milestones:** Final marketing materials due by June 25, 2024; launch event on July 10, 2024.
- **Team Members Involved:** Alice Johnson (Marketing), Robert Green (Sales)
- **Next Steps:** Finalize marketing materials and coordinate with the event planning team.
- **Relevant Contacts:** Alice Johnson (alice.johnson@abccorp.com), Robert Green (robert.green@abccorp.com)

2. Project Name 2: CRM System Upgrade

- **Description:** Implementing and training staff on the new CRM system.
- **Key Milestones:** System testing phase from June 15-22, 2024; full implementation by July 1, 2024.
- **Team Members Involved:** IT Team, Sales Team
- **Next Steps:** Complete testing and schedule training sessions for staff.
- **Relevant Contacts:** IT Support (it.support@abccorp.com), Sales Team (sales@abccorp.com)

Key Contacts

1. Sarah Lee

- **Role:** Senior Account Manager
- **Email:** sarah.lee@abccorp.com

- **Phone:** (555) 123-4567
- **Notes:** Primary contact for major clients.

2. Kevin Brown

- **Role:** Sales Director
- **Email:** kevin.brown@abccorp.com
- **Phone:** (555) 234-5678
- **Notes:** Oversees sales reporting and analysis.

Important Information

- **Documentation:** All important documents are stored in the shared drive under "Jane Doe - Handover."
- **Pending Approvals:** Awaiting approval for the Q3 budget proposal from Kevin Brown.
- **Access and Permissions:** Ensure access to the CRM system and shared drive is updated.
- **Other Notes:** Regularly check the shared calendar for upcoming client meetings and internal deadlines.

Conclusion

I am committed to ensuring a seamless transition and will be available to answer any questions or provide further clarifications until my departure. Please feel free to reach out to me if needed.

Thank you for your support and collaboration.

Best regards,

Jane Doe

Senior Account Manager



jane.doe@abccorp.com

(555) 345-6789