

## Guide to hassle-free handovers

### Introduction

As a coursebook or other product works its way through the publishing process, it also passes through many hands. From authors to editors, designers to digital and production teams, these crossover points are crucial: without clear communication, errors and misunderstandings can easily creep in.

A good handover note will help to ensure that the process runs smoothly and that any issues that need special attention are clearly visible to the person receiving the material, whether it is a manuscript, proofs, media assets or a digital component. The exact nature of the handover note will depend on the specific project, component and stage. However, there are some general features that are likely to be helpful in most handovers.

The following guide outlines some of these features and suggests a few strategies for ensuring a stress-free handover.

### Don't forget the basics

Check that your header information is complete and accurate before you send your handover. As a minimum, this will usually include the project, component, date, stage and possibly an ISBN, as well as the name of the person to contact with any questions regarding the handover (probably you, but not necessarily!) Although it may seem obvious, it's easy to omit a crucial piece of information, especially when a tight deadline is approaching.

#### Handover note

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**Course:** Generic English Course  
**Component:** B2 Student Book  
**Stage:** Second proofs  
**Task:** Proof review  
**From:** Jo Bloggs  
**Date:** 22 January 2020

*Include key information in the document header*

### Organise your docs

Depending on the complexity of the material, you may need to include a variety of documents and other files. It is good practice to list all the files you are sending, so the person receiving the handover can check that nothing is missing.

*List the files you are including in your handover*

#### Files supplied

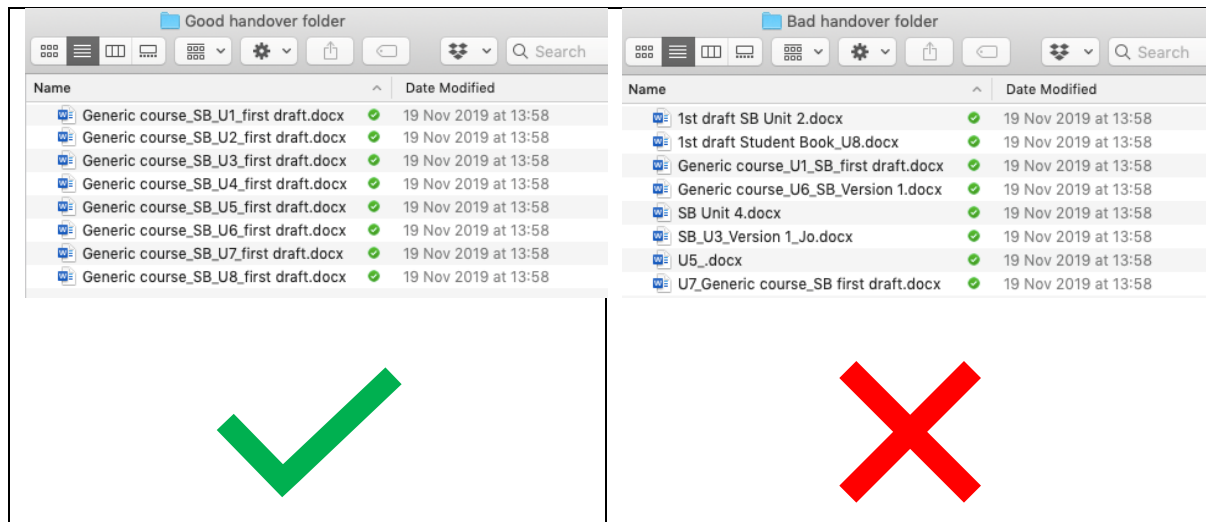
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I have uploaded the following files to the shared drive for the project:

- Reviewed B2 Student Book Second proofs PDF with mark up
- B2 SB Answer Key with tracked changes
- B2 SB Audioscript with tracked changes
- Word doc with additional material for p14, p29 and p76
- Style guide Google doc updated using 'Suggesting' mode (see [link](#))

This list also allows you to do a final check that you have attached or uploaded everything you should have before hitting send.

Consider organising files into separate folders if this will help the receiver to navigate through them. Consistent file names also help to ensure that files will appear in a logical order within folders.



### Summarise the key points

It can be useful to include a summary of the most important points, especially anything that the receiver might not be anticipating. This will help them to react appropriately and prioritise effectively. You should also include any global or recurrent issues here. Don't go overboard though – this should be a summary, not a catalogue!

### Formatting and cross-referencing

Take a moment to consider how best to convey the information you need to get across. Sometimes a table might be the clearest format, for example if you need to give page and exercise references for each issue you raise.

Page	Location	Issue/Query
Various	–	Photos are missing on the following pages: 3, 17, 18 (x2), 27, 31, 34
p16	Reading text	This reading text is the only one with no audio track. OK?
p30	Ex 3	Please check you are happy with the changes to this exercise.
p33	Bottom left image	This image doesn't seem to be related to the text. I would change it, e.g. to Shutterstock 12345678.
p34	Ex 1	The AK will need to be checked when all photos are in place to see if exercise works.

*Think about how to format your handover note for clarity*

For other types of information, a bullet-pointed list with thematic headings could be more appropriate.

Think about how to group your points, e.g. by page number, date or topic.

Remember to include any other references that will help the receiver to locate the content you are referring to, such as track numbers, image references or video/audio timestamps.

### Be clear and explicit

When explaining issues in a handover note, the key is to be as concise as possible but to give enough detail for the receiver to quickly grasp your point and act on it. In many cases, it is more effective to give (polite) instructions rather than posing questions, although this will depend on the circumstances. As well as flagging issues, it is a good idea to include suggestions for resolving them where possible.

### Have you met the brief?

Often a handover will come at the end of a particular stage of development or production. If there was a checklist or brief detailing the tasks to be carried out at that stage, it may be useful to look at this again now. Record any unresolved issues in your handover note so they don't slip through the cracks.

Although it may seem counterintuitive, it is worth starting your handover note at the beginning of a task, rather than at the end. That way, you can add to it as you go and, by the time the deadline arrives, your handover note will be more or less complete.