REPORTING SYSTEM HANDOVER REVIEW / ILLUSTRATIVE CASE

Can the new owner run month-end reporting alone?

The management decision

Use an independent run as the handover test. A folder full of files offers little assurance if the incoming owner cannot update an essential figure when the usual analyst is unavailable.

A report can be well established and still depend on an analyst who knows which files arrive late or how to handle a correction. A handover is a chance to capture those details before a departure, reorganisation or supplier change puts reporting at risk. The review shows whether the receiving team can actually run the process.

Worked example

The incoming owner completes seven of ten report-update tasks unaided. The other three show where access, instructions or an escalation contact are missing. Use the next run to check that the new owner can complete each step.

Example figure	What it represents
10	Report tasks
7	Done without help
3	Missing instructions

What changes the answer

An ordinary update may pass even if the instructions fail when a source file arrives late. Include an exceptional file from a past close before signing off the handover.

Reporting system handover review

What to commission

Walk through one report with its current owner and let the receiving owner attempt a normal update and an exception.

We check where inputs come from, what can go wrong and whom the new owner should contact. We use an independent run or walkthrough to show which steps the receiving team can complete with the information available.

How to judge the result

The receiving owner can complete the agreed tasks or show the exact instruction, permission or escalation still missing.

Count tasks completed without help and record the business consequence of the remaining gaps. Prioritise anything that would delay a reporting deadline.

Decision worksheet

Project detail	Starting point for your team
Decision owner	Reporting manager receiving a process. Name the person who will approve the next step.
Records to gather	A report with an upcoming handover, its schedule and a walkthrough by the current owner.
Agreed output	A dependency map, step-by-step instructions and a handover checklist.
Decision date	Record the deadline, any unresolved assumption and who will confirm it.

Discuss this case

Tell us which report is changing hands, the transfer date and the people involved. Mention what only the outgoing owner currently knows if you can identify it, or describe the last unexpected problem. The first discussion can focus on one report with a clear business deadline.

Email info@oxetc.co.uk and mention IT-12. All figures in the worked example are illustrative.