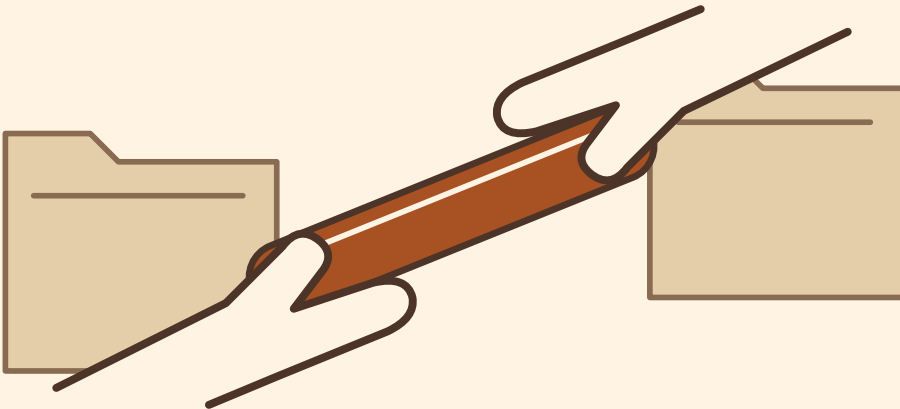




BUSINESS AND CUSTOMER ANALYTICS

Create Operational Handoffs That Survive Staff Changes

Transfer decisions, dependencies and access through a rehearsed working inventory



Sanjaay Gowda T S

FREE SAMPLE / INTRODUCTION + CHAPTER 1 / EDITION 1.0.0

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About this free sample

Create Operational Handoffs That Survive Staff Changes

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This first edition was prepared with AI assistance. The case studies are fictional teaching examples. Any measured outputs come from the supplied examples, not production customer data. The teaching scope, assumptions and limitations are explained in the chapters. Independent human technical, editorial and assistive-technology reader review is pending. Automated tests and accessibility checks do not establish certification or suitability for every use.

Run examples in a separate working folder using the supplied synthetic data. Review inputs and calculations before adapting the techniques to real operations. Model software, service access, subscriptions, ongoing updates and consulting are not included.

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This free sample contains the introduction and Chapter 1 only. The closing link opens the complete guide. The companion project and worked solutions are supplied with the complete ebook.

Start here

A handoff succeeds when another authorized person can continue the work, recognize an exception and know who can make the next decision. A folder of documents is only part of that system. The recipient also needs current ownership, dependencies, access, a usable next action and a safe way to rehearse the process. This book turns those requirements into a small operational inventory.

The worked case is Alder Service, a fictional team transferring a monthly reporting workflow between Mira and Jon. Every organization, person, task, date and decision is synthetic teaching material. The inventory contains completed access preparation, an open export task and a blocked report task. The report is deliberately stale and depends on unfinished work so the validator has meaningful issues to find.

You will define continuity, inventory active work, write runbooks, preserve decision context, check approved access, rehearse with a backup and manage the first changeover. The optional Python companion checks structural fields, review age and dependencies. It can detect a cycle or a missing backup, but it cannot prove that a runbook works, permissions are available or a person is ready.

The deliverables are a task inventory, two short runbooks, a decision log, a rehearsal record and an acceptance note. The reasoning requires familiarity with the team's work rather than programming experience. The companion needs Python 3.10 or later, uses the standard library and makes no network requests. Preserve the supplied fixture and test changes on copies.

This method applies to ordinary operational transitions, not only incidents or departing staff. It can help with leave cover, role changes and recurring work shared across a small team. Independent human technical and assistive-technology review is pending. Real transitions should follow the organization's approved access and employment processes. Do not place passwords, personal account details or unnecessary customer information in a handoff document because the teaching examples use a convenient local file.

1. Define what continuity requires

Start with the next operating period

Alder Service needs Jon to prepare the report if Mira is unavailable during the next monthly cycle. The continuity question is specific: can Jon locate approved inputs, create the export, check totals, prepare the brief and escalate a discrepancy? This is more useful than asking whether Mira has documented everything she knows. The latter request is unbounded and often produces a large archive with no clear acceptance test.

Name the work that must continue, its timing and its consequences. Some tasks can wait a day, while others have a fixed review window. Record those constraints without inventing universal criticality labels. A recipient needs to know which deadline is operationally meaningful and who can authorize a delay.

Separate knowledge and authority

Knowing how to perform a step does not mean the recipient may approve it. The handoff should distinguish operator, reviewer and decision owner where those roles differ. Jon may prepare an export while a service owner approves external release. If the authority boundary is missing, a diligent recipient can perform the documented steps and still make an unauthorized decision.

Google's incident-response guidance makes roles and transfer of responsibility explicit [R1]. This book adapts that principle to routine work. It does not import an entire incident command structure into a small monthly process. The useful idea is that responsibility should be named and accepted rather than assumed to move automatically when a document is shared.

Define an acceptance test

The handoff is ready when the backup can perform a safe representative task, explain its checks, find the escalation route and identify remaining limits. Document existence is not enough. A rehearsal should reveal missing context while the original operator is still available to answer questions.

Write a continuity contract with tasks, period, owner, backup, authority boundary and evidence of readiness. Keep it short enough to review in a meeting. The detailed runbooks can be linked. A compact contract helps prevent a transition from being declared complete merely because someone uploaded a folder before their final day.

Exercise 1: define readiness

Write a continuity contract for the fictional report cycle. Include the next operating period, backup and release authority. Propose a safe representative rehearsal and explain what it would demonstrate beyond the existence of a document.

Continue with the full guide

This free sample ends after the introduction and Chapter 1. The complete guide contains nine teaching chapters, worked exercise solutions, primary references and a separate Python companion project. The full PDF, reflowable EPUB and project files are supplied together.

Use the complete guide to work through the remaining exercises and inspect the supplied examples. The companion code and fictional data are separately MIT licensed; the complete ebook has the single-reader terms described on its product page.

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Primary references

1. [R1] Google SRE Workbook: Incident Response

<https://sre.google/workbook/incident-response/>

Explicit roles, communications and transfer of incident responsibility; this book adapts the ideas to ordinary operational handoffs.