3270 The Scope Handoff Document

People Fieldbook · https://kb.jeffreysummers.com/docs/3270-the-scope-handoff-document-2/

The Demand

Before your next hire takes a role, you put the transfer in writing. If you rely on the conversation you had in the interview or the walkthrough you gave on day one, you and the hire will remember it differently within six weeks, and the first disagreement will expose a boundary that was never actually set. If you do not write it down this week, you will be litigating scope from memory the first time a call goes sideways.

The Work

1. Pick the next role you are transferring or the last one you transferred without a document. Build the [Scope Handoff Document] before the hire's next shift, or by Friday if the hire is already in the seat.
2. Write the domain. Name the specific decisions that belong to this person and the specific outcomes they own. Name the areas you will not enter without invitation.
3. Write the Authority to Execute. List what the hire can spend, commit, hire, change, or stop without escalating to you. Check the number against reality: too narrow and they escalate everything, too broad and they make calls the operation cannot support.
4. Write the standards. Not your preferences — the documented, agreed-upon standard you will hold them to. Anything you would correct in the moment on the stage belongs here instead, to be enforced later at [The Ten-Minute Close].
5. Write the cadence. Set the day and length of the standing review that keeps this document alive. This is what schedules [The Ten-Minute Close].
6. Sit down with the hire and get sign-off from both sides before they take the role, or this week if they already have it.

This week, you produce one written, signed [Scope Handoff Document] for the role in question. Nothing verbal counts.