

Handover walkthrough: 20-minute agenda

Sample document. The business and people are fictional. This is the agenda we would follow to hand the pilot over to a real team.

Purpose

By the end of the 20 minutes, everyone who uses or owns the workflow should know how to work the desk, how to stop it and who to call. The walkthrough comes before the acceptance review in 07, so criteria 3 and 4 can be shown live.

Who attends

PERSON	WHY THEY'RE THERE
The owner, [named owner]	Owns the workflow, the accounts and the next review
Sam (office manager)	Uses the desk every day
Cover approver, [named at handover]	Uses the desk when Sam is away
Your IT provider (optional)	Looks after the email admin centre and the server
Carl Draper, Teknetik	Leads the session

Before the session

- ☐ Every attendee has their own desk login and has signed in once.
- ☐ [number agreed] test enquiries are ready to send from test addresses the firm controls. They cover a normal enquiry with missing details, the customer's reply that completes it, a complete form, a message with instructions hidden in it, and a gas smell.
- ☐ The owner can sign in to the email admin centre and the model supplier account.
- ☐ Printed or shared copies of 03-runbook, 04-exceptions and 05-rollback are ready.

Agenda

MINUTES	WHAT WE COVER	LED BY	DONE WHEN
0 to 2	What changed and what didn't. The desk sorts and drafts, people still decide, and nothing is sent without approval.	Carl	Everyone can say in one sentence what the desk does
2 to 6	A tour of the desk: the Waiting for you, Manual queue, Waiting for customer and Done tabs, the order of work, the original message beside the job card, and the five checks with their Pass, Check, Fix and You labels	Carl	Sam can find each part without help

MINUTES	WHAT WE COVER	LED BY	DONE WHEN
6 to 11	Sam handles the test enquiries live: "Approve and send", an edited reply, "Reject this draft" and "Handle it myself". The customer's reply joins its card, and Sam approves the job. We look at the job created in the job system and the reply in Sent items.	Sam	Sam has used all four choices
11 to 13	The safety card: phone first, then "Send the safety message". A Fix check and the "I've checked this" box.	Sam, with Carl	Sam explains what to do with a Fix check
13 to 16	Stopping: Sam pauses, a test enquiry lands in the manual queue, and Sam resumes and uses "Run the workflow again" on it. The owner talks through the four rollback steps and shows where each one is done.	The owner	The owner knows where each step is done
16 to 18	Where things live: this pack, the cost estimate, who owns which account, and when our access is removed	Carl	The owner has the pack and knows what happens at sign-off
18 to 20	Questions. Agree the date of the next review and who owns it.	The owner	The date and owner are written into 07

Points to make clear

- The AI can be wrong. That is why the original message sits beside the job card, and why a person approves everything.
- Pausing is always allowed. Anyone with a desk login can do it, without asking first.
- Nothing is lost when the workflow stops. The original emails stay in the shared inbox.
- Under care, Teknetik acknowledges requests within two working days. It is not an emergency line.
- The desk is only watched in office hours. Anyone getting in touch out of hours needs the gas emergency number from the website and the voicemail greeting.

After the session

- ☐ Carry out the acceptance review (07), using what was shown today for criteria 3 and 4.
- ☐ Complete the access removal checklist (02).
- ☐ Delete the test enquiries from the job system, and the test replies if the firm prefers.
- ☐ Note any questions we couldn't answer, with who will follow up and by when.