**Version History**

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| **Ver. No.** | **Authors** | **Date** | **Reviewers** | **Review Date** | **Release Date** |
| 1.0 | Managed IT Team | 02-Nov-2020 | QMF | 06-Nov-2020 | 10-Nov-2020 |
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**Change History**

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| **Ver. No.** | **Section** | **Date** | **Change Information** | **RFC No.** |
| 1.0 | All | 10-Nov-2020 | New Release | - |
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**Guideline for Handing over and taking / induction of new members in projects**

When a team member (including Project Manager & Team Leads) in a project is changed during the project, the work has to be taken over by some other.

This guideline can be used depending on the role of the new member. This helps in ensuring proper hand-over takeover.

**Project Overview:**

* Orientation / Brief about the project scope
* Introduction of team members, Client, Internal dependent groups, briefing of roles and responsibilities
* Brief the status of the project
* Brief the technical aspects of the project
* Brief about the estimations. Browse through the estimation sheet.
* Brief the assumptions made and any change in assumption which is likely to affect the effort

**Work Allocation and Training Needs:**

* Brief about the project planning and how work allocation is done
* Brief about the project’s process / client processes
* Brief about the tools used in the project
* Brief commitments made regarding the s/w, h/w, human resources by support groups and their availability.
* Hand-over correspondence (including the correspondence before the start of the project) in the form of e-mails, faxes, telephonic conversation.
* Brief about details of Resources requirement, availability, training needs, HW/SW requirements, availability, etc
* Initiate Information Security and other mandatory training programs
* Attach a new team member with an existing member for some time to get familiar with the project

**Issue and Risks:**

* Explain the detail the queries raised and replies received, which is mentioned in the Issue log
* Explain the status of unresolved issues mentioned in Issue log
* Brief the risks identified, responses planned and action plans. Also update the recent actions in risk management
* Brief major technical / managerial decisions made during the project, if any

**Project Execution Activities:**

* Brief the status of Data Collection, Metrics / SLA /TAT targets, and status of action plans
* Brief about Configuration Management activities
* Brief about coding standards, review checklists used etc.
* Brief the category wise defect summaries, Bug Report
* Brief about compliance/Audit reports
* Brief the release and implementation process, acceptance criteria, warranty details and expectations of the client
* Handover feedback from customer for the deliverables/documents sent
* Provide access to new member and removal of access rights for outgoing member
* Prepare hand over takeover document and obtain the signature of both handing-over and taking-over persons.
* Information regarding the KRAs set for individual team members, feedback about team members, development plan for resources and appraisal process

Project Specific handover checklist can be formed based on guidelines shared in this document.