BORNE / THE OWNER'S HANDOFF KIT

Stop being the bottleneck.

One recurring task. One clear handoff. A place to start.



LESS RE-EXPLAINING. MORE USEFUL WORK.

A printable worksheet · 3 worked examples · 3 AI prompts

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01 / PICK THE RIGHT JOB

Start smaller than you think.

Choose one recurring task that gets stuck waiting for you. Prepare the next useful result; keep the consequential decision with its owner.

CHOOSE A TASK THAT PASSES THESE FOUR CHECKS

It repeats. You can name the next time it will happen.

The facts exist. You can provide a current email, brief, checklist or policy.

The output is visible. You can say exactly what a useful draft or organized result looks like.

The boundary is clear. You know who can approve a price, promise, refund or external send.

TURN THE VAGUE JOB INTO A FINISH LINE

“Help with customers” → “Prepare a reply using the customer’s question and our return policy. List missing facts. Leave the refund decision to the supervisor.”

“Get this client started” → “Prepare a kickoff checklist and welcome draft from the signed scope. Flag missing access. Do not promise a start date.”

YOUR FIRST TASK

The recurring job is: _____

The next useful result is: _____

If the facts or approval rules are missing, your first handoff can be a precise list of what is needed and who can supply it.

02 / THE ONE-PAGE HANDOFF

Give the task a home.

Print this page or copy the headings into a note. Use one sheet per recurring responsibility.

1. THE RESULT

What exactly should come back? Format, recipient and finish line.

2. THE SOURCE

Which current brief, message, policy or approved example supplies the facts?

3. THE RULES

What must stay true? Include limits, exclusions and source dates.

4. THE MISSING PIECES

What is unknown? Who can answer each question?

5. THE DECISION

What needs approval, and who is authorized to approve it?

6. THE NEXT OWNER + CHECKPOINT

Who receives the draft? When is it reviewed? What happens if they are away?

7. THE REPEAT

What triggers the next case? Where will this brief and the accepted result live?

03 / WORKED EXAMPLE · QUOTE REQUEST

A quote that can move.

Fictional training example. The useful result is a clarification draft and a sales checklist, not an invented quote.

THE SOURCE

A buyer asks for **240 Model R filters**. They request delivery next Friday. The grade or exact item number is missing. Current price, stock and delivery capacity have not been supplied.

THE HANDOFF

Prepare: a customer clarification email and the internal checks needed for a quote.
Use: only the supplied request.
Keep with sales: item match, price, stock and delivery commitment.

PREPARED CUSTOMER REPLY

Thanks for your request for 240 Model R filters. Could you confirm the grade or exact item number? We have noted your requested delivery next Friday. Once the item is confirmed, our sales team will check current pricing, availability and delivery options before we confirm the quote.

PREPARED INTERNAL CHECKLIST

1. **Buyer:** confirm grade or item number.
2. **Sales:** match the item and check current price and stock.
3. **Fulfillment:** confirm whether the requested date is achievable.
4. **Authorized sales reviewer:** approve the quote and reply before sending.

WHAT MAKES THIS HANDOFF USABLE

The customer gets one precise question. Sales gets named checks. A requested date stays a request until somebody with authority confirms it.

04 / WORKED EXAMPLE · CLIENT KICKOFF

Turn “yes” into next.

Fictional training example. A clear kickoff separates agreed work, missing input and a new request.

THE SOURCE

The agreed launch package includes **one landing page and one revision**. The client has sent the logo and product copy. Analytics access is missing. They ask for a second page. No start date or extra price has been approved.

THE HANDOFF

Prepare: a welcome draft, an input checklist and a scope question.
Use: the agreed package and received-material list.
Keep with the project lead: start date, added scope and price.

PREPARED WELCOME DRAFT

Thanks for sending your logo and product copy. Your launch package includes one landing page and one revision. Please send analytics access so our project lead can review the remaining inputs and confirm kickoff. We have recorded your request for a second page; we will discuss its scope and price separately before any additional work is agreed.

PREPARED KICKOFF RECORD

Received: logo; product copy.
Needed from client: analytics access.
Decision for project lead: proposed start date after input review.
Separate scope item: second page, pending agreement.
Next owner: project coordinator returns the complete checklist to the lead.

Reuse the accepted kickoff brief next time. Update the actual scope and inputs; never carry a previous client’s dates or promises into a new case.

05 / WORKED EXAMPLE · CUSTOMER FOLLOW-THROUGH

Pick up the thread.

Fictional training example. A ready-to-review reply can move the case forward while preserving the approval step.

THE SOURCE

For order **EX-204**, one cup arrived damaged. The photo has been received. The customer also requests a shipping-address change. The supplied rule requires supervisor approval for address changes and replacements. No approval is recorded.

THE HANDOFF

Prepare: a customer reply and a supervisor handoff.
Use: the case facts and supplied approval rule.
Keep with the supervisor: address change and replacement decision.

PREPARED CUSTOMER REPLY

I’m sorry one of your cups arrived damaged. We have received the photo for order EX-204. Please confirm the shipping details you want us to use. Our supervisor will review the address change and replacement request before we confirm the next step.

PREPARED SUPERVISOR HANDOFF

Known: one damaged cup; photo received.
Waiting for customer: confirmed shipping details.
Decision needed: approve or decline the address change and replacement under the supplied rule.
Next owner: support agent updates the customer after the supervisor’s recorded decision.

Close the loop by recording the decision and the actual customer update. A prepared reply is useful work; it is not evidence that a replacement was sent.

06 / COPY, PASTE, ADAPT

Three prompts you can reuse.

Fill in the brackets. Share only material you are permitted to use; remove unnecessary private details before using an AI assistant.

1 / PREPARE THE HANDOFF

Using only [SOURCE MATERIAL], prepare [SPECIFIC RESULT]. Follow [RULES AND LIMITS]. Return: (1) the usable draft, (2) missing facts and who can supply them, (3) decisions for [AUTHORIZED REVIEWER], and (4) the next owner and checkpoint. Mark unknowns. Do not invent prices, dates, approvals or actions. Prepare only; do not send or change anything.

2 / REVIEW THE RESULT

Compare [DRAFT] with [SOURCE MATERIAL] and [RULES]. List each unsupported claim, missing fact, scope change and promise needing approval. For each issue, quote the draft wording and identify the supporting source or mark it unsupported. Then produce a corrected draft. Keep unresolved decisions visible. Do not assume that a polished draft is approved.

3 / MAKE THE NEXT CASE EASIER

From [ACCEPTED RESULT] and [APPROVED RULES], create a reusable handoff checklist. Include the trigger, required inputs, result format, responsible role, approval step and fallback when information is missing. Use placeholders for case-specific names, dates and prices. Flag conflicting rules for review. Do not generalize a one-time exception into a standing rule.

A human still checks the source, quality and permission to act. These prompts organize work; they do not grant an assistant authority to make commitments.

07 / PUT IT TO WORK

One case. Then improve it.

Use the worksheet on the next real task. You are looking for a handoff your team can repeat, not a perfect system on the first attempt.

Before you begin

Choose the task, gather the current source and name the reviewer. Fill in page 3.

When the draft comes back

Check the facts against the source. Resolve the missing input or approval. Record what changed.

After the case closes

Save the accepted result with the brief. Note how many times you had to re-explain something. Add the missing rule before the next case.

KEEP A SIMPLE BEFORE / AFTER NOTE

Task: _____

Where I had to step in: _____

What I will clarify next time: _____

WANT BORNE TO HELP WITH A REAL TASK?

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Borne helps turn ideas into finished projects. Business-task support is a separate service, scoped around your work. You keep the key decisions.