HELIO WORKS

A CONSIDERED HANDOVER

OPERATIONS FIELD MANUAL / EDITION 01

Make the handover easy to trust

A coordination playbook for delivery leads, customer teams and project owners.



Eight procedures

Prepare. Handover. Close.

Three practice cases

Decisions with explanatory feedback.

Developed with Steady State. Fictional procedures and generated imagery. This manual covers coordination and records, not installation methods, electrical safety or professional certification.

READ THIS FIRST

A clear record.
A responsible next person.

Use the current version

Check the accepted scope and project record before acting. A newer message does not automatically replace an approved plan.

Keep exceptions visible

Missing evidence, unaccepted handoffs and unanswered questions remain open until the appropriate owner resolves them.

PROCEDURE	OWNER	USE WHEN
P01 · Accept the work package	Delivery coordinator	A project is ready to enter the delivery queue.
P02 · Confirm the visit	Scheduling coordinator	A provisional appointment has been selected.
P03 · Resolve a late change	Project lead	Scope, access or availability changes after planning.
P04 · Prepare the handover pack	Handover coordinator	The authorised technical team reports the job ready for customer handover.
P05 · Run the customer conversation	Customer handover lead	The customer handover has been arranged and the pack checked.
P06 · Keep an exception open	Project lead	An item is unresolved at handover.
P07 · Review the project record	Delivery coordinator	The project reaches the closure review.
P08 · Capture a useful improvement	Operations lead	The team reviews a completed delivery or recurring coordination problem.

These example roles and steps require adaptation to the organisation's approved operating system. The companion app stores practice progress only in the current session. Open the training companion ↗

WORKING PROCEDURES / START

P01 / PREPARE / DELIVERY COORDINATOR

Accept the work package

Use when: A project is ready to enter the delivery queue.

Have ready: Approved scope, named customer contact and the current project record.

1. Check the scope version and the responsible project lead.
2. List missing information as an open item with an owner.
3. Confirm that the delivery team has accepted the package.

Complete when: Package accepted with a named owner; unresolved items stay visible.

> If the scope version is unclear, return it for clarification before scheduling.

Record: Scope version, accepting owner, acceptance date and open items.

P02 / PREPARE / SCHEDULING COORDINATOR

Confirm the visit

Use when: A provisional appointment has been selected.

Have ready: Accepted work package, customer availability and the team’s authorised schedule.

1. Confirm the appointment window and the contact route.
2. Share agreed preparation information from the approved project plan.
3. Record whether the customer has acknowledged the arrangements.

Complete when: The appointment and contact route are confirmed in the project record.

> If acknowledgement is missing, keep the visit provisional and escalate through the scheduling lead.

Record: Appointment window, confirmation status and next contact owner.

WORKING PROCEDURES / CONTINUED

P03 / PREPARE / PROJECT LEAD

Resolve a late change

Use when: Scope, access or availability changes after planning.

Have ready: Current plan, the reported change and the people affected.

1. Record the change without silently overwriting the agreed baseline.
2. Ask the authorised lead to assess implications and decide the next action.
3. Update the customer and team using the agreed revised plan.

Complete when: A decision, revised version and communication owner are recorded.

> If the change is unresolved, do not describe the original appointment or scope as reconfirmed.

Record: Change reference, decision owner, revised plan and notification status.

P04 / HANDOVER / HANDOVER COORDINATOR

Prepare the handover pack

Use when: The authorised technical team reports the job ready for customer handover.

Have ready: Approved technical completion record and the required customer documents.

1. Check the required-document list against the supplied records.
2. Separate missing documents from completed items.
3. Route technical questions to the authorised technical owner.

Complete when: Pack is complete or each gap has a named owner and agreed resolution route.

> Do not create, infer or sign technical completion evidence. A missing record remains missing.

Record: Pack version, document checklist, gaps and responsible owners.

WORKING PROCEDURES / CONTINUED

P05 / HANDOVER / CUSTOMER HANDOVER LEAD

Run the customer conversation

Use when: The customer handover has been arranged and the pack checked.

Have ready: Current handover pack and the customer's agreed contact details.

1. Explain where the supplied documents and support contacts can be found.
2. Invite questions and record unanswered items accurately.
3. Confirm the next contact and update timing for each open question.

Complete when: Documents are located, questions recorded and next steps understood.

> If a question needs technical judgement, route it to the qualified owner; do not improvise an answer.

Record: Conversation date, documents shared, open questions and promised updates.

P06 / HANDOVER / PROJECT LEAD

Keep an exception open

Use when: An item is unresolved at handover.

Have ready: The unresolved item, its effect and the responsible specialist or team.

1. Describe the issue and distinguish known facts from assumptions.
2. Assign an owner and a next-update commitment.
3. Keep the item visible until its authorised resolution is recorded.

Complete when: Ownership and the next update are explicit; closure awaits resolution evidence.

> A sent email, referral or booked follow-up is not proof that the issue is resolved.

Record: Exception reference, status, owner, update date and eventual closure evidence.

WORKING PROCEDURES / CONTINUED

P07 / CLOSE / DELIVERY COORDINATOR

Review the project record

Use when: The project reaches the closure review.

Have ready: Accepted records, handover pack and the current exception register.

1. Check that versions and references match the project.
2. Verify closure evidence for items described as resolved.
3. Route remaining open items to the accountable owner.

Complete when: The closure decision and any ongoing responsibilities are documented.

> Do not label the project fully closed while unresolved obligations remain unassigned.

Record: Review date, closure decision, reviewer and continuing actions.

P08 / CLOSE / OPERATIONS LEAD

Capture a useful improvement

Use when: The team reviews a completed delivery or recurring coordination problem.

Have ready: A specific recorded example and feedback from the people involved.

1. Describe what happened without assigning unsupported blame.
2. Identify one proposed process change and an owner to test it.
3. Set a review point and record what would show improvement.

Complete when: A small test has an owner and an observable review question.

> A single example is not proof of frequency or a company-wide trend.

Record: Example reference, proposed change, test owner and review question.

PRACTICE / APPLY THE DISTINCTION

Three moments that test the process

The changed appointment

A customer reports that the agreed access arrangement has changed. The team is due tomorrow.

Practice question: What should the coordinator do first?

Reference P03. Correct. Preserve the baseline and make the change, decision owner and next action visible.

The missing document

The handover pack is missing a required technical record. Someone suggests marking the checklist complete to avoid delay.

Practice question: What is the appropriate response?

Reference P04. Correct. Coordination can identify and route the gap; it cannot invent the missing evidence.

The unresolved question

A customer asks a technical question during handover. The handover lead cannot answer it.

Practice question: What should happen next?

Reference P06. Correct. The customer needs a clear next step without an invented answer.

Completion is not certification.

Use the app to practise the decisions and inspect feedback. Local progress records familiarity with this example; it does not prove competence or authorise technical work.