

Creative Project Handoff Audit

The review is on the calendar. The approved brief is somewhere in the thread. Use this sheet to find the gaps before production starts asking which file is current.

Trace one real project handoff

Pick a campaign or creative job that recently moved from brief to review or production. Follow the work as it actually moved. Mark what exists today; do not score the process you wish you had.

CHECKPOINT	CURRENT RESOURCE OR STEP	OWNER	LAST CHECKED
Approved brief and scope			
Current copy and design files			
Decision needed at this review			
Feedback and change-request route			
Next owner and due date			
Final export or production packet			

What keeps getting reconstructed?

Write down the moment someone has to stop and ask: “Which version?” “Who owns this?” “Where do I leave feedback?” Keep it specific. A vague complaint will not help you choose a useful pilot.

The recurring handoff gap

Run a small, honest pilot

A tag can open one team-selected destination from a folio or production case. Your files, permissions, approvals, and system of record stay where they are.

Measure the handoff you have

MEASURE	BEFORE	DURING PILOT	NOTES
Time to reach selected brief or asset			
Review interruptions from version uncertainty			
Links with a named owner and review date			
Stale or broken destinations encountered			

A simple capacity estimate

(eligible resource lookups x observed minutes avoided / 60) x loaded hourly labor cost = estimated staff capacity

Use your own observed numbers. This is a way to size possible capacity, not a savings promise. Keep project approvals and final-file control in the team's existing workflow.

Keep the pilot narrow

- [] Choose a few active folios or sample cases and one approved destination.
- [] Name who owns the destination and when it will be reviewed.
- [] Record the usual handoff before adding tags; compare similar work afterward.
- [] Stop if the tag adds another step, the destination goes stale, or the existing system is already easier.

Keep client work private. Do not write confidential file details, passwords, access tokens, or personal data on the tag or in its URL. The destination may require the usual sign-in. A tag does not prove approval, capture leads, or update project software.