

FREE GUIDE

The Handoff Template Pack

Make approvals faster with
structured handoffs

Unclear Handoffs Slow Approvals

The Problem

Most approvals are slow because the handoff is unclear. Work gets sent for approval without context, evidence, or decision criteria. The approver has to ask follow-up questions and request missing information.

5-10 hrs

lost per week to approval delays caused by unclear handoffs

The Root Cause

The work is done. It is just waiting for approval because the handoff was incomplete. The approver does not have everything they need to make a fast decision.

A structured handoff template solves this. A simple format that gives the approver everything they need upfront.

This guide gives you 3 handoff templates for the most common approval scenarios: client-facing work, financial transactions, and compliance documentation.

3 Handoff Templates

Client-Facing Work

Proposals, Reports, Emails

Required Fields:

Client name, document type, due date, context, attachments, recommended action, deadline

Approval Criteria

All sections complete, no errors in client details/pricing, follows brand guidelines, meets client expectations

Financial Transactions

Invoices, Payments, Refunds

Required Fields:

Transaction type, amount, vendor/client, due date, context, attachments, recommended action, deadline

Approval Criteria

Amount matches invoice, vendor details correct, budget approved, all required approvals obtained

Compliance Documentation

Policies, Procedures, Audits

Required Fields:

Document type, compliance requirement, due date, context, attachments, recommended action, deadline

Approval Criteria

Meets regulatory requirements, follows policy standards, all sections complete, no compliance risks

Ready to Speed Up Approvals by 50-70%?

Unlock the Full System

Get the complete Approval Ownership Playbook with escalation workflows, approval automation rules, and continuous improvement loops.

[Unlock the playbooks library →](#)

Book a Strategy Call

I will review your specific workflows, identify your top 3 approval bottlenecks, and show you exactly how I would speed up your approvals by 50-70%.

[Book your 30-minute call →](#)

About Remotee

I help Australian businesses speed up approvals by building structured handoff systems. I do not just place people. I build the systems, train the team, and give you ongoing support.

remotee.com.au

How to Use + Decision Request Format

6-Step Process

- coun** Choose the template that matches your handoff type
- coun** Fill in all required fields (do not leave blanks)
- coun** Attach all required evidence (documents, receipts, references)
- coun** Include a recommended action (approve, approve with changes, reject)
- coun** Set a clear deadline for approval (when do you need the decision?)
- coun** Send the handoff (use your project management tool or email)

Decision Request Format

Recommended Action: Approve / Approve with changes / Reject

Reason: Why are you recommending this action?

Alternatives: What other options did you consider?

Impact of Delay: What happens if not approved by deadline?

Common Mistakes

Sending without context

Always include context (why needed? what is expected?)

Not attaching evidence

Attach all documents, receipts, references before sending

No recommended action

Always recommend approve/changes/reject and explain why

Not setting a deadline

Always include when you need the decision