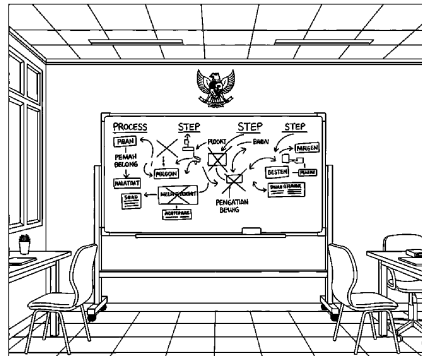


# Process-Ownership Reassignment Framework

*Use when a redesigned process has no designated owner, when ownership needs to shift after a reorganization, or when a process owner is leaving. Complete before the transition happens, not after.*



Complementary worksheet for  
*Business Process Reengineering*  
by Ibrahim Anwar

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## What This Is For

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A process without an owner reverts to the old way within six to eighteen months. This is not a discipline failure. It is a structural one: no mechanism exists to notice deviation, teach new staff the standard, or update the documentation when conditions change. Ownership reassignment is the structural solution, and it fails for a specific reason most of the time -- it is handled after the previous owner has left or the reorganization has happened, when the knowledge that should have been transferred is no longer available.

This worksheet is for the gap between 'the process has an owner' and 'the new owner can run the process without referring to the previous one.' That gap should be closed before the handover, not after. Three questions define whether the gap is closed: can the new owner explain how the process works without asking anyone? Can they train a new employee? Can they update the documentation when something changes? If any answer is No, the gap is a documentation failure, not a personnel failure, and the fix is completing the documentation before the handover date.

## Benefits

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What you get when you actually run this worksheet on a real situation:

- Prevents the most common ownership failure: a handover that happens in a meeting but leaves the new owner unable to run the process independently within the first month.
- Forces documentation gaps to surface before they become operational failures: if the new owner cannot answer the three questions without asking the previous owner, the documentation is incomplete.
- Ties the first quarterly review to a calendar date before the handover is complete, removing the most reliable predictor of a review that never happens.
- Creates a written record of ownership for each critical process, accessible to staff and to auditors without asking the owner.
- Scales across reorganizations: the same framework works whether one process is being handed over or twelve.

# Framework To Use

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## — Three-Responsibility Handover Test

*A process ownership transfer is complete only when the new owner can answer three questions independently: how the process works, who trains new staff, and who updates the documentation. Any gap in those three answers is a documentation gap to close before the handover session.*

<b>RESPONSIBILITY 1 -- HOW IT WORKS</b>	<b>RESPONSIBILITY 2 -- WHO TRAINS NEW STAFF</b>	<b>RESPONSIBILITY 3 -- WHO UPDATES THE DOCUMENTATION</b>
<p>The new owner can explain every step in the process map without referring to the previous owner, the original documentation author, or anyone who was present when the process was designed.</p>	<p>The new owner can run a 30-minute onboarding session for a new employee covering the process from start to finish, using only the documented standard. No verbal supplements from the previous owner needed.</p>	<p>The new owner has explicit authority to revise the process documentation when conditions change. Not 'ask management first.' Explicit authority, written into the ownership assignment.</p>

## How To Use

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Follow these steps in order. Each one builds on the previous.

- 1 List every critical process requiring ownership assignment or reassignment in column one. Include processes being handed over after a departure, processes created by a redesign that have no owner yet, and processes affected by a reorganization.
- 2 Fill in the current owner (by role, not name) and the reason for reassignment: departure, reorganization, redesign completed with no owner assigned, or initial assignment.
- 3 Fill in the proposed new owner role. Confirm with that person that they accept the responsibility before writing the name in.
- 4 For the 'Three responsibilities' column: write the answers to all three questions -- how it works, who trains, who updates -- before the handover session. If you cannot write those answers, the documentation is incomplete. Do not hold the handover session until they can be written.
- 5 Set the handover session date. The session agenda: the new owner walks through the process documentation out loud, the previous owner (or documentation author) corrects gaps, and both parties sign the ownership transfer record.
- 6 Set the first quarterly review date before closing the handover session. Put it in both parties' calendars. A review scheduled after the handover has a 64% non-completion rate (KPMG Indonesia, 2022).
- 7 After the handover, file the completed framework sheet with the process documentation. It is the audit trail showing when ownership transferred and who holds it now.

## Example Use

*A distribution business with 45 staff is reorganizing after the operations manager who owned three critical processes resigned with four weeks' notice. The owner needs to transfer ownership of goods receipt, order processing, and shipping confirmation before the departure date.*

The owner uses the framework to map all three processes. Two weeks before the departure date, the answers to the three responsibility questions are filled in for each process.

For goods receipt: the new owner (warehouse lead) can explain how the process works -- she runs it daily. She can train new staff: a 30-minute walkthrough using the documented SIPOC. She can update the documentation: explicit authority granted and written into the ownership sheet. Three responsibilities: all answerable. Handover session: one hour, two days before departure. First quarterly review: eight weeks out, on the calendar.

For order processing: the new owner (senior sales coordinator) explains how the process works from his perspective, but cannot explain the admin submission step in detail -- that step was handled exclusively by the departing manager. Gap identified: the admin submission procedure is not documented at the step level. The documentation is written in a two-hour session with the outgoing manager before the handover.

For shipping confirmation: the proposed new owner (shipping clerk) cannot answer the second question -- he has never trained anyone on this process and does not know the full procedure. A secondary session is scheduled: the outgoing manager runs the shipping clerk through the full process twice over three days, the shipping clerk then writes the process description from memory, and the outgoing manager corrects it. The handover is delayed one week until the clerk can answer all three questions independently.

All three handovers complete before the departure date. Three quarterly reviews are on the calendar.

# The Worksheet

Tear this out, copy it onto a fresh sheet, or fill it in directly.

<b>Process-Ownership Reassignment Framework</b>								
<i>Use when a redesigned process has no designated owner, when ownership needs to shift after a reorganization, or when a process owner is leaving. Complete before the transition happens, not after.</i>								
<b>PROCESS NAME</b>	<b>CURRENT OWNER (ROLE)</b>	<b>REASON FOR REASSIGNMENT</b>	<b>PROPOSED NEW OWNER (ROLE)</b>	<b>R1: CAN EXPLAIN HOW IT WORKS (Y/N)</b>	<b>R2: CAN TRAIN NEW STAFF (Y/N)</b>	<b>R3: HAS DOCUMENTATION UPDATE AUTHORITY (Y/N)</b>	<b>HANDOVER SESSION DATE</b>	<b>FIRST QUARTERLY REVIEW DATE</b>

## Reflection Prompts

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*After filling in the worksheet on the previous page, work through these.*

1. For every row where any of R1, R2, or R3 is N: that is a documentation gap, not a personnel gap. Write in the notes below which question failed and what documentation needs to be created or completed before the handover session can proceed.  

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2. Schedule the first quarterly review date before closing the handover session -- not after. A review date left unscheduled at handover will not be scheduled spontaneously. Write the calendar date in both parties' systems before leaving the room.  

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# Tips and Traps

TIPS	TRAPS
<ul style="list-style-type: none"> <li>• Start the framework at least three weeks before any anticipated handover date. Two of the most common documentation gaps -- undocumented exception paths and missing update-authority language -- take one to two weeks to resolve even when identified early.</li> <li>• The 'three responsibilities' column is the key diagnostic. If a new owner can answer all three without referring to the outgoing owner, the documentation is complete and the handover can happen cleanly. If they cannot, the work is documentation, not orientation.</li> <li>• When ownership transfers after a reorganization rather than a departure, the previous owner is still available. Use that window to close documentation gaps before the reorganization takes effect, not after the new structure has created competing priorities.</li> <li>• Write process ownership into a visible register -- a table on the wall, a shared spreadsheet -- not just into a framework sheet filed in a folder. Staff who need to know who owns a process should be able to find the answer without asking the owner.</li> </ul>	<ul style="list-style-type: none"> <li>• Treating the handover session as the beginning of knowledge transfer rather than the confirmation of it. If knowledge transfer happens during the handover session, the session will take four hours and still leave gaps. Transfer knowledge first, use the session to confirm and sign.</li> <li>• Assigning ownership to a role that does not have the positional authority to update the process when conditions change. A process owner without update authority will either make undocumented changes (invisible drift) or escalate every change to the manager (a new bottleneck).</li> <li>• Skipping the first quarterly review because the new owner 'seems to be managing fine.' The first three months after ownership transfer are when undocumented exceptions surface. The quarterly review is the mechanism for catching and documenting them.</li> <li>• Using names rather than roles in the ownership record. When the person in the role changes, the process appears to lose its owner even though the role still exists. Ownership belongs to the role, not the person.</li> </ul>

# Appendixes

## Appendix A -- Ownership Transfer Sign-Off Record

Process name: \_\_\_\_\_

Transfer date: \_\_\_\_\_

Outgoing owner (role): \_\_\_\_\_

Incoming owner (role): \_\_\_\_\_

Confirmed before handover:

- R1: Incoming owner can explain all process steps without referring to outgoing owner.
- R2: Incoming owner can run a 30-minute new-staff orientation using only the documented standard.
- R3: Incoming owner has written authority to update process documentation without further approval.

First quarterly review date: \_\_\_\_\_

(Calendar invite confirmed:  Yes)

Signatures:

Outgoing owner: \_\_\_\_\_ Date: \_\_\_\_\_

Incoming owner: \_\_\_\_\_ Date: \_\_\_\_\_

Manager / Owner: \_\_\_\_\_ Date: \_\_\_\_\_

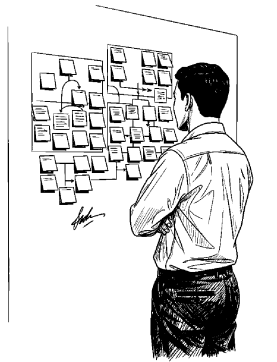
## Appendix B -- Process Ownership Register (Post-Transfer Summary)

Maintain this table in a shared, visible location after all transfers are complete:

Process name	Owner (role)	Last reviewed
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Review schedule: quarterly for critical processes, semi-annual for supporting processes.

A process not reviewed within the past 12 months is at risk of drift regardless of who the documented owner is. Trigger a review if the last-reviewed date is more than 9 months ago.



WHERE THIS WORKSHEET COMES FROM

## **Business Process Reengineering**

*A Process That Has Run a Long Time Is Not Necessarily a Correct Process*

by Ibrahim Anwar

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This worksheet is one of nine in the *Business Process Reengineering* companion worksheet pack. The full pack is grouped into three categories: high-volume worksheets you can run weekly, niche-search worksheets for rare but high-value situations, and specific-case worksheets that walk you through a single concrete scenario.

Every framework, decision filter, and figure used in these worksheets is drawn from the chapters of the source book. The book sets the diagnosis, the worksheets give you the form to act on it.

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Read the source book on Google Play Books:

<https://play.google.com/store/books/details?id=VYvXEQAQBAJ>

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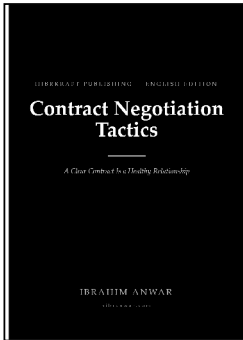
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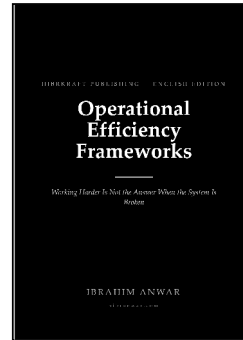
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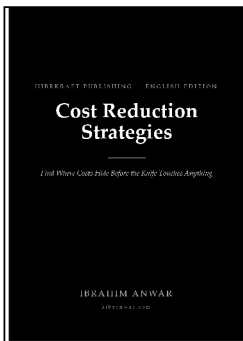
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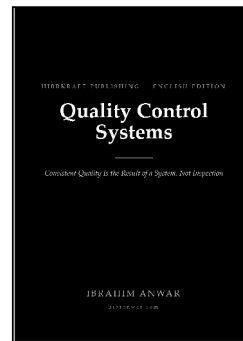
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