CASE FILE 07

CONFIDENTIAL

TEMPLATE HANDOFF LIBRARY

EST. IMPACT: 30–60 minutes per week

WHAT'S HAPPENING

The same work keeps getting rebuilt.

The same emails are rewritten.

The same documents are reformatted.

The same explanations are repeated.

Each instance feels small, but the **cost is cumulative.**
Time is lost not doing the work, but restarting it.

THE FIX

Create a Template Handoff Library.

Any email, document, or task you perform **more than once a week** becomes a template.

Each template defines:

- What this is
- When to use it
- What "done" looks like

When the work appears again, you start from the template and adjust details instead of rebuilding from zero.

ADDITIONAL NOTES

- Templates can be PDFS, Word docs, email drafts, or shared files. The format doesn't matter as long as it's reusable.
- Build templates so only names, dates, or a few fields need to change.
- If you copy and paste something more than twice, it should live in the library.
- Keep templates close to where you work so using them is faster than starting fresh.