

Analysis Handover Note for a Colleague

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Version 1.0 | 8 October 2026

Explain what an analysis answers, where its inputs came from and what another person needs to reproduce or update it. Use the note alongside the actual analysis files.

Use fictional or authorised data. This note does not prove that data is accurate or that the analysis is suitable for every decision. Apply your organisation's information-handling rules.

How to use the record

1. State the decision question, population and period before describing a chart.
2. List input files, versions and the location an authorised colleague can access.
3. Explain transformations, metric definitions and checks with evidence references.
4. Record limitations, update instructions and a contact or review owner.

Fictional worked example

Question: How many fictional practice learners completed the exercise in September?

Inputs: practice attendance v1 and practice completion v1; both fictional.

Method: Match practice learner references and count distinct completion records.

Checks: Compare row counts before and after matching; inspect unmatched records.

Limitations: Missing completion records may indicate missing data rather than non-completion.

Update instruction: Replace the practice inputs only after checking column names and the reporting period.

Complete your own record

Word: replace the guidance in the right column and add space or rows as needed. PDF: print this page and write your entries; it is not an interactive form. Save your own working copy with a clear filename and version.

Record field	Your entry
Decision question population and period	[Enter your details here]
Input filenames versions and authorised location	[Enter your details here]
Metric definitions and exclusions	[Enter your details here]
Transformations or calculation steps	[Enter your details here]
Checks performed and evidence references	[Enter your details here]
Known limitations and unresolved questions	[Enter your details here]
Update instructions and dependencies	[Enter your details here]
Owner review date and handover acknowledgement	[Enter your details here]

Review before using the record

Ask a colleague to describe the method back to you. Clarify any step they cannot reproduce. An acknowledgement means receipt of the handover, not independent validation of the results.

Keep the unedited master separate from your completed working copy. Store sensitive information only in an authorised location. Original RDE practice aid; no guarantee of employment, business results or compliance.