

Hand over what matters. Follow it up. Help people grow.

For supervisors, operations managers, quality and HR partners choosing how shifts hand over, how teams review the day, and how one-to-ones are prepared and followed up.



Carry issues, don't retype them

The next shift sees the same open record.

Define each number

Numerator, denominator and period, in writing.

Coach, don't score

Records inform a conversation; people agree the next step.

CONTENTS

What's inside

1	What's native, what's your procedure	3
2	A handover template that works	4
3	Worked case: an issue carried forward	5
4	Huddle measures: define them first	6
5	The action log	7
6	Coaching: preparing a constructive session	8
7	Actions, follow-up and private access	9
8	Training evidence vs qualification decisions	10
9	Supervisor RFP test pack	11
10	First month and sources	12

How to use this guide. Rows are tagged **V5 FEATURE** where V5 records it today, and **YOUR PROCEDURE** where your team defines and carries it out. Handover, huddle and coaching views are built from V5's work, quality and training records; confirm the layout for your site in a demo.

Sources explain buyer questions; they are not V5 compliance claims. Reviewed 2 October 2026.

1 • SCOPE

What's native, what's your procedure

AREA	BUILT FROM IN V5	PLAN	YOUR PROCEDURE
Shift handover	V5 FEATURE Open work orders from the kiosk, equipment status, open deviations; outgoing signs, incoming acknowledges	All; signatures Pro, Ent	Template content per area, what must be discussed
Daily huddle	V5 FEATURE Measures from work orders, scheduling and reports; deviations and CAPA	All; quality records Pro, Ent	Which measures, targets, meeting rhythm
Issue follow-up	V5 FEATURE Issue with owner and due date that stays listed until closed in its own record	All	Who may close, escalation if overdue
Coaching and one-to-ones	V5 FEATURE Recent work, training due and events gathered for preparation; actions carried to the next session	Pro, Ent (training records)	Session rhythm, who may see notes, HR policy

Not claimed. V5 does not score, rank or judge people, and its AI does not either. No view replaces your HR, employment or qualification procedures. This guide is not legal or employment advice.

2 · HANDOVER

A handover template that works

Short, the same every shift, and built from records rather than memory.

SECTION	OUTGOING SUPERVISOR RECORDS	INCOMING SUPERVISOR CHECKS	SOURCE
Work in progress	Jobs open and how far along	Starts where the last shift stopped	Kiosk / work orders
Open issues	Deviations, holds, complaints in progress	Same records still open, owner known	Quality records
Equipment	Faults, open maintenance jobs, calibration due	Which machines are safe to run	Asset records
Safety	Near misses, temporary controls	Controls still in place	Safety log
Staffing	Absences, training on line	Cover arranged	Notes
Anything else	One free-text line	Asked about face to face	Notes

Outgoing signs

Confirms the handover happened and what was said.

Incoming acknowledges

Confirms they received it. It doesn't approve the work in it.

Nothing closes by handover

Issues close only in their own record.

Same issue, same record

No retyping between shifts.

3 • WORKED CASE

Worked case: an issue carried forward



1

18:00 • day shift

Job J-412 60% complete; Mixer 2 seal weeping; Deviation D-118 awaiting QA

RECORDED

Three open items listed

WHO DECIDES

Day lead

2

18:02 • sign out

Day lead discusses each item and signs

RECORDED

Signature with time

WHO DECIDES

Day lead

3

18:05 • acknowledge

Night lead acknowledges, asks about Mixer 2

RECORDED

Acknowledgement with time

WHO DECIDES

Night lead

4

02:30 • during night

Maintenance fixes seal; job record closed by technician

RECORDED

Mixer 2 item clears from the open list

WHO DECIDES

Technician

5

06:00 • next handover

J-412 complete; D-118 still open and shown again

RECORDED

Same deviation record, not a copy

WHO DECIDES

Night lead

Test it. Close an item in its own record mid-shift and check it disappears from the next handover, while an unclosed item reappears unchanged.

Huddle measures: define them first

S
0 injuries · 1 near miss

Q
2 holds · 1 open deviation

D
11 of 12 orders on time

C
Scrap 1.8% vs 1.5% target

TILE	NUMERATOR	DENOMINATOR	PERIOD	EXAMPLE
Safety	Recorded injuries; near misses listed separately	—	Previous shift / day	0 injuries, 1 near miss
Quality	Lots placed on hold; deviations opened	Lots produced (for a rate)	Yesterday	2 of 14 lots held
Delivery	Orders shipped by committed date	Orders due in period	Yesterday	$11 \div 12 = 91.7\%$
Cost	Scrap weight	Total input weight	Yesterday	$18 \text{ kg} \div 1,000 \text{ kg} = 1.8\%$

Agree whether a late order counts on the due day or the ship day, and whether near misses are counted or just listed. Change a definition only with a dated note, or trends stop meaning anything.

The action log



ISSUE	OWNER	DUE	STATUS AT NEXT HUDDLE
Seal check failures on L-5530	Quality lead	Tomorrow 06:30	Sealing jaw replaced; deviation still open with QA
Labeller reel changes slow	Line lead	Friday	Trial of pre-staged reels
Near miss: pallet at blind corner	Safety rep	Today 14:00	Mirror ordered; temporary cone in place

Rules that keep it honest. One owner, one due date. Items stay on the board until closed in their own record. Overdue items are discussed first. Ten minutes, standing.

Coaching: preparing a constructive session



PREPARE FROM RECORDS	ASK THE PERSON	AVOID
Training completed and due	What went well since we last met?	Comparing them with colleagues
Recent work and events they were part of	What got in the way?	Turning an event into blame
Actions agreed last time	What support would help?	Surprises: share the facts first

Records describe what happened, not why or how well. The conversation supplies context. No score or ranking is produced.

7 • FOLLOW-THROUGH

Actions, follow-up and private access

STEP	GOOD PRACTICE
Agree	One or two actions, agreed by both, written in plain words
Date	Next review set before the session ends (for example, in 4 weeks)
Follow up	Last session's actions are the first item next time
Close	Action marked done or changed, with a short note

Questions about who can see what

QUESTION	WHAT TO CONFIRM	OK
Who can read session notes?	Operator, their supervisor, and anyone else your policy names	☐
Can a new supervisor see past sessions?	Decided by your policy and configured roles	☐
What happens when someone leaves?	Retention follows your HR policy	☐
Can notes be exported or deleted on request?	Answered in writing for your jurisdiction	☐

Access depends on roles you configure. Test it by signing in as each role. This is a configuration question, not a security guarantee.

Training evidence vs qualification decisions

Training evidence

V5 FEATURE Who completed which training, when, and what is due. The kiosk can gate tasks by role and competence.

Qualification decision

YOUR PROCEDURE A competent person decides someone is qualified for a task, using your criteria.

Coaching

YOUR PROCEDURE A supportive conversation. It is not an assessment unless your procedure says so, and then it should be a separate record.

QUESTION	WHY IT MATTERS
Which tasks need sign-off before working alone?	Drives kiosk gating
Who may sign someone off?	Separates trainer, assessor and supervisor
What happens when training expires?	Task blocked or warning, your choice
Which sector rules apply to your training records?	Your quality team confirms; requirements vary by product and market

9 • PROVING IT

Supervisor RFP test pack

#	TEST	EXPECTED	PASS
1	Outgoing signs with one item undiscussed	Your rule applies (warn or block)	
2	Incoming acknowledges	Both names and times visible	
3	Issue closed mid-shift	Gone from next handover	
4	Issue left open	Reappears unchanged, same record	
5	Huddle tile figure	Traced to the underlying records	
6	Action overdue	Shown first at next huddle	
7	One-to-one notes	Visible only to configured roles	
8	Agreed action	First item at next session	
AREA	WHAT TO SEE DEMONSTRATED	SYSTEM A	SYSTEM B
Handover	Built from records, signed, carried forward	_____	_____
Huddle	Defined measures, traced figures	_____	_____
Actions	Owner, due date, follow-up	_____	_____
Coaching	Supportive, private, no scoring	_____	_____
Total (0–3 each)		_____	_____

10 • NEXT STEPS

First month and sources

WEEK	DO	EVIDENCE
1	Handover template per area (page 4); run tests 1–4	Template and test records
2	Huddle measure definitions (page 6) signed by operations and quality	Definitions sheet
3	Start daily huddle and action log on one line	Two weeks of actions
4	Agree one-to-one rhythm and access with HR; first sessions	Policy note, sessions held

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Standards

- **ISO 22400-2:2014, KPIs for manufacturing operations management (under revision)** — www.iso.org/standard/54497.html

V5

- **Shift handover** — v5ultimate.com/features/shift-handover
- **Shift huddle (SQDC)** — v5ultimate.com/features/shift-huddle-sqdc
- **Coaching & 1-on-1s** — v5ultimate.com/features/coaching-1on1
- **Pricing and plans** — v5ultimate.com/pricing

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