



THE SYSTEM CFO SERIES
HINDOL DATTA

FREE ASSESSMENT

PILLAR 1: STRATEGIC SYSTEMS | TOOLKIT #1 OF 37

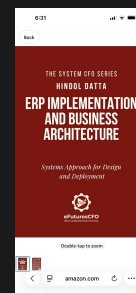
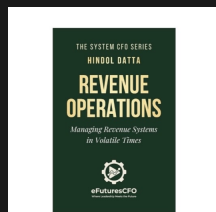
THE CROSS-FUNCTIONAL HANDOFF INTEGRITY MAP

*Auditing Value Leaks at Department Boundaries
Where Does Information Die Between Functions?*

20-Question Diagnostic | 5-Page Assessment

Score Your Organization 1-5 Across Four Dimensions
Identify Gaps and Build Your Action Plan

FROM THE AUTHOR OF



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Where Leadership Meets the Future

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QUESTIONS 1-5

Section A: Handoff Identification

Do You Know Where Every Cross-Functional Handoff Occurs?

Value leaks at handoff points are invisible in most organizations because no single function owns the boundary. The first step is simply knowing where every handoff exists — the points where work, data, or decisions cross from one team to another. Most organizations cannot list their top 10 handoffs, let alone score them.

A. HANDOFF IDENTIFICATION AND MAPPING

| | | | | | | |
|---|--|-------------|-------------|-------------|-------------|-------------|
| 1 | All cross-functional handoffs in core business processes (quote-to-cash, hire-to-retain, procure-to-pay) have been identified and documented. | 1 Non-Ex | 2 Ad Hoc | 3 Develo | 4 Establ | 5 Best P |
| 2 | Each handoff has a clearly defined sender (the function handing off) and receiver (the function receiving), with both parties agreeing on what constitutes a complete handoff. | 1 Non-Ex | 2 Ad Hoc | 3 Develo | 4 Establ | 5 Best P |
| 3 | The data, documents, or decisions that must transfer at each handoff point are explicitly specified — not assumed or left to tribal knowledge. | 1 Non-Ex | 2 Ad Hoc | 3 Develo | 4 Establ | 5 Best P |
| 4 | The method of transfer (system integration, email, spreadsheet, verbal, ticket) is documented for each handoff, distinguishing automated from manual transfers. | 1 Non-Ex | 2 Ad Hoc | 3 Develo | 4 Establ | 5 Best P |
| 5 | Critical handoffs — those where failure causes customer impact, revenue delay, or compliance risk — have been flagged and prioritized for improvement. | 1 Non-Ex | 2 Ad Hoc | 3 Develo | 4 Establ | 5 Best P |

SECTION A SCORE: Total: ____ / 25 Average: ____ / 5



QUESTIONS 6-10

Section B: Data Integrity at Handoffs

Does Information Survive the Journey Between Functions?

Data degrades every time it crosses a boundary. Format changes cause translation loss. Manual re-entry introduces errors. Context stripping removes the why behind the what. The IFCD Model measures four dimensions: Integrity (accuracy), Flow (speed), Consumption (usability), and Distribution (reach). This section focuses on the Integrity dimension.

B. DATA INTEGRITY AND INFORMATION QUALITY

| | | | | | |
|--|---------------------|---------------------|---------------------|---------------------|---------------------|
| <p>6 Data transferred at handoff points arrives at the receiving function without format translation errors — the same field names, units, and structures are used on both sides.</p> | <p>1 Non-Ex</p> | <p>2 Ad Hoc</p> | <p>3 Develo</p> | <p>4 Establ</p> | <p>5 Best P</p> |
| <p>7 Context travels with the data: when a customer issue is handed from Sales to Customer Success, the full history, not just the ticket number, transfers automatically.</p> | <p>1 Non-Ex</p> | <p>2 Ad Hoc</p> | <p>3 Develo</p> | <p>4 Establ</p> | <p>5 Best P</p> |
| <p>8 Manual re-entry of data at handoff points has been eliminated or reduced to less than 5% of all handoff transactions.</p> | <p>1 Non-Ex</p> | <p>2 Ad Hoc</p> | <p>3 Develo</p> | <p>4 Establ</p> | <p>5 Best P</p> |
| <p>9 Data quality is measured at each critical handoff point — error rates, missing fields, and format mismatches are tracked and trended monthly.</p> | <p>1 Non-Ex</p> | <p>2 Ad Hoc</p> | <p>3 Develo</p> | <p>4 Establ</p> | <p>5 Best P</p> |
| <p>10 When data quality fails at a handoff, there is an automated alert or exception process that flags the failure before it propagates downstream.</p> | <p>1 Non-Ex</p> | <p>2 Ad Hoc</p> | <p>3 Develo</p> | <p>4 Establ</p> | <p>5 Best P</p> |

SECTION B SCORE: Total: ____ / 25 Average: ____ / 5



QUESTIONS 11-15

Section C: Cycle Time and Flow

How Long Does Work Wait at Handoff Boundaries?

Most cycle time in any process is queue time, not processing time. Work sits in someone's inbox, waiting for attention, waiting for approval, waiting for context that should have arrived with the handoff. The IFCD Flow dimension measures how quickly work moves through handoff points without unnecessary delay.

C. CYCLE TIME, QUEUE TIME, AND FLOW VELOCITY

| | | | | | |
|---|---------------------|---------------------|---------------------|---------------------|---------------------|
| <p>11 Queue time at each critical handoff has been measured — you know how long work waits between the sender completing their step and the receiver beginning theirs.</p> | <p>1 Non-Ex</p> | <p>2 Ad Hoc</p> | <p>3 Develo</p> | <p>4 Establ</p> | <p>5 Best P</p> |
| <p>12 Service level agreements (SLAs) exist for critical handoffs, defining the maximum acceptable time between handoff and pickup by the receiving function.</p> | <p>1 Non-Ex</p> | <p>2 Ad Hoc</p> | <p>3 Develo</p> | <p>4 Establ</p> | <p>5 Best P</p> |
| <p>13 Handoff queue times are tracked on a dashboard visible to both the sending and receiving function leaders, creating shared accountability for delays.</p> | <p>1 Non-Ex</p> | <p>2 Ad Hoc</p> | <p>3 Develo</p> | <p>4 Establ</p> | <p>5 Best P</p> |
| <p>14 Escalation protocols exist for handoffs that breach their SLA — there is a defined trigger, escalation path, and resolution owner for stuck handoffs.</p> | <p>1 Non-Ex</p> | <p>2 Ad Hoc</p> | <p>3 Develo</p> | <p>4 Establ</p> | <p>5 Best P</p> |
| <p>15 Total end-to-end process cycle time has been decomposed into processing time versus queue time, and queue time at handoff points represents less than 30% of total cycle time.</p> | <p>1 Non-Ex</p> | <p>2 Ad Hoc</p> | <p>3 Develo</p> | <p>4 Establ</p> | <p>5 Best P</p> |

SECTION C SCORE: Total: ____ / 25 Average: ____ / 5

QUESTIONS 16-20

Section D: Ownership and Accountability

Who Owns the Boundary When Nobody Owns the Boundary?

The fundamental problem with handoffs is that nobody owns the gap. Sales owns the quote. Finance owns the invoice. But who owns the moment the quote becomes an order and the order becomes a billing event? Ownership gaps at boundaries are where value dies. This section assesses whether your organization has closed these accountability gaps.

D. OWNERSHIP, ACCOUNTABILITY, AND CONTINUOUS IMPROVEMENT

| | | | | | | |
|----|---|--------|--------|--------|--------|--------|
| 16 | Every critical handoff has a single named owner — a specific individual (not a team or role title) who is accountable for the handoff functioning correctly. | 1 | 2 | 3 | 4 | 5 |
| | | Non-Ex | Ad Hoc | Develo | Establ | Best P |
| 17 | Handoff owners from both the sending and receiving functions meet regularly (at least monthly) to review handoff performance, resolve issues, and improve the process. | 1 | 2 | 3 | 4 | 5 |
| | | Non-Ex | Ad Hoc | Develo | Establ | Best P |
| 18 | There is a formal process for redesigning broken handoffs — not just escalating failures, but systematically analyzing root causes and implementing structural fixes. | 1 | 2 | 3 | 4 | 5 |
| | | Non-Ex | Ad Hoc | Develo | Establ | Best P |
| 19 | Cross-functional handoff performance is included in the performance reviews or OKRs of the managers on both sides of the boundary. | 1 | 2 | 3 | 4 | 5 |
| | | Non-Ex | Ad Hoc | Develo | Establ | Best P |
| 20 | The organization conducts a quarterly or annual handoff audit — systematically reviewing all critical handoffs, scoring them, and prioritizing improvements based on business impact. | 1 | 2 | 3 | 4 | 5 |
| | | Non-Ex | Ad Hoc | Develo | Establ | Best P |

SECTION D SCORE: Total: ____ / 25 Average: ____ / 5

OVERALL ASSESSMENT SCORE

Section A: ____ / 25 Section B: ____ / 25 Section C: ____ / 25 Section D: ____ / 25 TOTAL: ____ / 100 AVG: ____ / 5

GAP TO GOAL

Gap-to-Goal Action Plan

Bridging the Gap from Current State to Best Practice — Cross-Functional Handoff Integrity Map

Transfer your five lowest-scoring questions from the assessment. For each gap, define the target state, the specific actions required, the owner, the timeline, and the success metric. Focus on the highest-impact gaps first. Small, consistent improvements compound into transformational change.

| GAP # | QUESTION RECURRENT SCORE | SCORE SET SCORE | SPECIFIC ACTION TO CLOSE GAP | OWNER | DEADLINE | SUCCESS METRIC |
|-------|--------------------------|-----------------|------------------------------|-------|----------|----------------|
| 1 | Q__ | ___/5 | ___/5 | _____ | _____ | _____ |
| 2 | Q__ | ___/5 | ___/5 | _____ | _____ | _____ |
| 3 | Q__ | ___/5 | ___/5 | _____ | _____ | _____ |
| 4 | Q__ | ___/5 | ___/5 | _____ | _____ | _____ |
| 5 | Q__ | ___/5 | ___/5 | _____ | _____ | _____ |

ASSESSMENT SUMMARY

Assessment completed by: _____ Date: _____

Overall average score: ___ / 5 Number of items scored 1-2 (critical): ___

Number of items scored 3 (developing): ___ Number of items scored 4-5 (strong): ___

Top strength (highest score): _____

Most critical gap (lowest score): _____

One thing I will change this week: _____

READY TO GO DEEPER?

This free assessment identified your gaps. The Premium System CFO Toolkits provide the frameworks, templates, and action plans to close them. Visit EfuturesCFO.com





READY TO GO DEEPER?

This Assessment Identified the Gaps. The Premium Toolkit Closes Them.

PREMIUM: The Cross-Functional Handoff Integrity Map (12 Pages)

The full premium toolkit includes the complete IFCD Model assessment framework, 15-row handoff inventory, deep-dive analysis templates for your 5 most critical handoffs, data degradation pattern analysis, cycle time decomposition maps, ownership and SLA design templates, handoff redesign worksheets, and an executive scorecard with 90-day

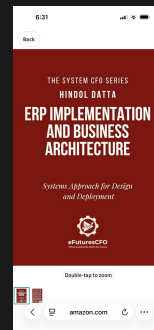
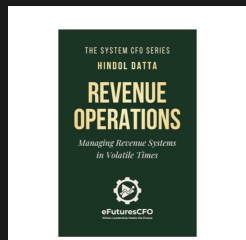
Plus, Access the Super Exclusive 46 Page System CFO Organizational Finance Assessment Kit

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