

New manager handover pack

Tasks for you, the outgoing manager



Leaving your organisation / current role?
Good luck on your new adventure!

We know you must have a hundred things to sort out so we've prepared a handy checklist which you can use to handover your program!

1 **Add your colleague as a grant manager in your account.**

This can be done via *Users > New user*. Fill in the details, including a 12-character password and tick **Grant manager** on the right side under **Account roles**.

It is essential you do this as **we cannot grant manager access** due to security reasons.

2 **Send an email to help@goodgrants.com advising:**

- you are no longer going to manage the program
- introducing us to the new manager
- who the new account owner will be (provide name and email).
Read - [Who is an account owner?](#)

3

Put aside some time to give an overview of the account setup to your colleague and to us.

We can only provide technical assistance but it's you who really knows your program!

The overview should ideally cover how the application form has been configured. **For example:**

- "Reviewers need to see the before and after photos"
- "Doing it this way will help you send all the files to the PR team for post-grant publication"
- "This is needed for John from HR"
- "This grant category was only running for one year and can be removed for the next season"
- "We need to keep the galleries from each previous year open for viewing"
- "This question highlights why the applicant's contribution was key"

And so on! You could also include any processes you have implemented outside of Good Grants for your colleagues (e.g export this report every Monday for team meeting).

One quick way of doing the overview is to create a video so your colleague(s) can refer to it any time!

There are some free tools for this such as:

- Inbuilt Quicktime on Mac
- Vidyard Chrome extension
- Zoom Clips

Now you can pass along this information to your colleague.

(Bye, we will miss you!)

New Account owner / Grant manager

Welcome to Good Grants!

We hope you've had a good handover from your colleague and are well aware of the program's setup and requirements. To help you get into the thick of things, we've put together a few suggestions below:

1 For security purposes, we advise you to remove manager access in Good Grants for your outgoing colleague. To do so:

- Go to Users in the left-hand menu
- Search for their name, then click on their name in the list to edit the details
- Untick Grant manager from the right hand side
- Leave Applicant as the only role.
- Click Save

2 Take a moment to familiarise yourself with Good Grants.

Watch our collection of videos to see Good Grants in action in our [video library](#).

3 The best way to learn a system is to use it!

As you go from one section to another, use the 'Need help?' button freely on the right side of your screen. This shows relevant help articles and video tutorials to help you understand what a feature does and how to use it.

Below are some of our popular articles you may be interested in:

- [General settings](#)
- [Grant reporting](#)
- [Content, terms and more](#)
- [Video tutorials](#)

If you feel you need a personalised help, we offer a new manager training program for USD 500. You can read more about it and book your first session here: [New manager training program](#).