

Client Project Handover

By Checklist

☐ Identify the handover and acceptance basis

Complete these fields for the actual project. The receiving owner operates the work; the authorized approver makes the acceptance decision.

☐ Identify the project and client

Use the project name or reference and client name.

☐ Record the planned handover date

Enter the agreed handover date. Record any later change in the handover notes.

☐ Name the receiving owner and authorized approver

Enter the receiving operational owner, authorized client approver and delivery lead with their roles. Confirm that each knows their responsibility.

☐ Reconcile every promised deliverable

List each promised deliverable with the agreed acceptance criterion, or give a reference to the controlled scope/criteria register. Include accepted scope changes. Final versions and locations are recorded below.

☐ Resolve scope differences before sign-off

For each missing, changed, or excluded item, record the agreed resolution and supporting approval. Keep unresolved differences visible with an owner and next review date; do not silently mark them delivered.

☐ Agree how the client will review the work

Record who will review which checks, the agreed review method and response date. Use the acceptance process already agreed for the project.

☐ Package and verify the final deliverables

Rename the starter deliverable to match the project, and duplicate it before the run for each independently accepted deliverable. Remove or replace examples that do not apply. No example is a completed client record.

☐ Record deliverable: rename for this project

Editable starter: a final report, website release, design package or dataset. Rename this group and duplicate it for each agreed deliverable. Fill the real location, version and result below.

☐ Link the final deliverable

Use the approved client-accessible location for this item.

☐ Identify the version and acceptance criteria

Record the exact version/release date and the measurable agreed checks for this deliverable. Reference the scope register where helpful.

☐ Record the deliverable verification result

Open the actual final version and perform the agreed checks. Record the tested version, result, evidence reference and any remaining gap. An untested or failed item is not accepted.

☐ Reconcile the deliverable records with the agreed scope

Check that every promised item has a final version and verification record above. Add missing deliverable groups. Keep any unresolved mismatch visible in the open-items record.

☐ Include the agreed source files and dependencies

Check that the editable source files, exports, assets and configuration documentation promised for this project are included. Record restrictions or separately licensed dependencies in the index. Examples to adapt: editable design file, source repository, content export.

☐ Create a single handover index

Enter the approved link or retrievable reference for the client-accessible index linking final versions, operating information and the open-items record. Verify every link with the receiving team's authorized access.

☐ Verify access and operational ownership

Record the actual receiving owners and service references, then test authorized use. Use the organization's approved transfer and secure-sharing systems.

☐ List the accounts and assets that need an owner

List each applicable service or asset, receiving owner, required role and approved transfer/reference location. Starter examples: website/CMS, source repository, shared deliverable folder, domain account. Rename or omit examples to fit the project; use safe references to approved systems.

- ☐ **Complete the agreed ownership and access transfers**
Use each service's approved invitation or transfer process and obtain any required authorization. Confirm the receiving owner accepted the transfer and has the required role; track any blocked transfer with an owner and date.
- ☐ **Have the client test access using their own account**
For each listed service, have the receiving user use their own account to perform the required action. Record service, tested action, result and tester/date. Examples: preview a draft content change, open/edit an agreed source file, retrieve the final export. Leave failed and untested access visible with its next action.
- ☐ **Assign renewals, backups, and service notifications**
For applicable services record the owner for renewals, backups and service notices, plus the next relevant dates. Verify that the responsible contact receives the notices. If these responsibilities are outside scope, state that and reference the agreed boundary.
- ☐ **Explain how to use and maintain the work**
Make routine use and recovery understandable to the people taking over.
 - ☐ **Write a practical operating guide**
Document how to find the deliverables, perform the main workflow, make routine updates, and check that an update worked. Include prerequisites and known limits; have someone follow the guide to catch missing steps.
 - ☐ **Document maintenance and recovery steps**
List recurring maintenance, backup locations, and the steps for restoring or reverting a failed change where relevant. Name the responsible role and show where to escalate a problem that the client should not fix alone.
 - ☐ **Run the handover walkthrough**
Have a receiving user repeat the key workflow with their own access. Record date, participants, what they completed and any unanswered questions.
 - ☐ **Resolve or assign questions from the walkthrough**
Update unclear instructions and verify the answers with the receiving team. Give every remaining question a named owner and response date, with a link to where the answer will be recorded.
- ☐ **Agree open items and support arrangements**
Make remaining work and existing support obligations explicit.
 - ☐ **Record every unresolved defect or follow-up**
For each remaining item record the issue/reference, impact, owner, next action and target date, or link an approved list with those fields. Write "None identified" only after review. Distinguish delivery defects from new requests.
 - ☐ **Confirm which open items affect acceptance**
Record the authorized approver's decision about which open items block acceptance and which may remain under the existing agreement. Include its evidence reference; state explicitly if there are no agreed conditions.
 - ☐ **Record the agreed support boundaries**
Reference the governing support agreement and summarize its period, coverage and exclusions. Resolve unclear terms through the agreed process; do not create new promises here.
 - ☐ **Confirm the support and escalation contacts**
Give the client the agreed support channel, primary contact, backup contact, and escalation route. Check that the contact details work and that the named people know their responsibilities.
- ☐ **Confirm receipt and close the handover**
Record the decision and receipt separately. The record captures an existing authorized decision; a choice or task completion is not a signature or contractual acceptance.
 - ☐ **Obtain and record the client's acceptance decision**
Record the actual decision (accepted, accepted with agreed conditions, not accepted or pending), authorized approver, decision date, exact deliverable versions and approval evidence reference. Keep pending or rejected work visible; do not infer acceptance from a sent email.
 - ☐ **Confirm the client received the complete handover**
Record who confirmed receipt, the actual date and the index/version received. Confirm the receiving team has the deliverables, access, operating guide and open-items/support information. Receipt is separate from acceptance.
 - ☐ **Archive the approved project record**
Store the final versions, scope decisions, test evidence, acceptance record, and handover correspondence in the agreed archive. Confirm the responsible team can retrieve them and apply the existing retention and access rules.

☐ **Remove temporary access when continuity is confirmed**

Review temporary accounts, shared links, and supplier access with the responsible owner. After the client can operate independently and required support access is agreed, obtain authorization for removals and record what was removed; retain only necessary, approved access.

☐ **Verify the agreed handover closure conditions**

Leave this action open while required deliverables, access or acceptance remain blocked. Close only after the authorized decision, receipt and agreed continuity conditions are evidenced. Assign remaining accepted follow-ups separately with owners and dates. A filled answer records the observation; it does not resolve a blocker.