Client Handover Checklist

Close out a client project and leave the next owner ready to take over.

Project _____ Handover date _____

Prepare the handover

- [ ] Match the final files against the agreed deliverables.
- [ ] Label the final versions and organise them in one shared location.
- [ ] Include editable source files and a short guide to what each file is for.
- [ ] Record known issues and any unfinished work.
- [ ] List renewals and recurring costs with their owners and dates.

Walk through the work

- [ ] Show the client how to complete the most common tasks.
- [ ] Transfer account ownership using each service’s invitation tools.
- [ ] Have the client confirm they can open the files and access key accounts.
- [ ] Explain where to find instructions and request support.
- [ ] Record any questions and agree who will resolve them.

Confirm closeout

- [ ] Ask the client to confirm receipt and acceptance of the deliverables.
- [ ] Agree who owns ongoing work and when any support period ends.
- [ ] Review which project access can be removed after the transfer.
- [ ] Record the handover date and share a copy of the agreed next steps.

Follow-up notes