

Project Handover Checklist

A clear plan to transfer a project to a new owner or team without losing knowledge.

Prepare the Handover

- ☐ Confirm the incoming owner and the handover date
- ☐ Agree on an overlap period for questions and support
Even a week of overlap reduces costly gaps.
- ☐ Tell stakeholders who their new point of contact will be
- ☐ List everything that needs to transfer
- ☐ Schedule the knowledge-transfer sessions in advance

Document the Project

- ☐ Write a current status summary with open items
- ☐ List active tasks, deadlines, and dependencies
- ☐ Document known risks, issues, and workarounds
- ☐ Record key decisions and the reasons behind them
- ☐ Create a directory of key contacts and vendors
- ☐ Note where all files and systems are located

Transfer Access and Credentials

- ☐ List all systems, tools, and accounts in use
- ☐ Grant the new owner the access they need
- ☐ Transfer or reset shared passwords securely
Use a password manager, never plain email.
- ☐ Reassign ownership of files, repos, and folders
- ☐ Update licenses and subscriptions to the new owner
- ☐ Confirm the incoming owner can log in to everything

Run Knowledge Transfer

- ☐ Walk the new owner through the project end to end
- ☐ Demonstrate recurring tasks and routine processes
- ☐ Explain stakeholder relationships and expectations
- ☐ Cover common problems and how to handle them
- ☐ Record sessions or notes the owner can revisit
Recordings help when questions surface later.

Verify the Handover

- ☐ Have the new owner complete a key task on their own
- ☐ Review the handover document together for gaps
- ☐ Confirm all access works as expected
- ☐ Answer any remaining questions before stepping back
- ☐ Agree on who to contact for follow-up issues

Sign Off and Close

- ☐ Confirm both owners agree the handover is complete
- ☐ Get written sign-off from the manager or sponsor

- ☐ Revoke the outgoing owner's access where appropriate
Remove old access promptly to keep systems secure.
- ☐ Send a final note announcing the new owner
- ☐ Archive the handover documents for reference