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
  Highlight active blockers and recurring technical glitches so the incoming lead is not blindsided.
- [ ] 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
  Have them test every tool while you are still available to troubleshoot permissions or 2FA issues.

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
  Shadowing while they execute a real task confirms true comprehension far better than passive listening.

- [ ] 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
  Formal sign-off establishes clear accountability and confirms the transition period has officially ended.
- [ ] 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