

# Phase 10: Project Handover & Maintenance

**Objective:** To ensure smooth transition of the Salesforce Insurance Portal to stakeholders with detailed handover, documentation, and post-deployment maintenance plan.

## Key Components:

- 1. Final Documentation Handover: Provide all project documents (requirement specs, data model diagrams, workflows, reports, dashboards).
- 2. Knowledge Transfer: Conduct training sessions for stakeholders, admins, and support staff.
- 3. User Guides: Deliver detailed user manuals for policyholders, agents, and admins.
- 4. Support Plan: Define L1, L2, and L3 support processes.
- 5. Monitoring Setup: Enable Salesforce Health Check, security scans, and audit trails.
- 6. Change Management Process: Define process for enhancements, bug fixes, and new feature requests.
- 7. Post-Deployment Review: Conduct retrospective to evaluate success and lessons learned.
- 8. Maintenance Plan: Regular backups, system monitoring, and seasonal updates for compliance.

## Deliverables:

- ✓ Final project documentation package
- ✓ User guides and training materials
- ✓ Handover report
- ✓ Maintenance & support plan
- ✓ Post-deployment review report

## Outcome:

Successful handover of the Salesforce Insurance Portal project to stakeholders with a clear maintenance and support strategy, ensuring long-term sustainability.