

WordPress Project Handover: Comprehensive Due Diligence Checklist

A successful WordPress handover is not just about sharing files and passwords—it's a process of transferring knowledge, responsibility, and control. This checklist combines strategic, technical, operational, and legal considerations to ensure a seamless transition and minimize risks for the new owner.

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1. Project Overview & Intent

- **What is the primary purpose of the website?** *Clarifies business goals and informs future decisions (e.g., e-commerce, lead generation, content hub).*
 - **Are there unique business rules or workflows?** *Identifies custom logic or processes that may impact maintenance.*
 - **How has the website evolved over time?** *Highlights major pivots, technical debt, or legacy features.*
 - **What are the key performance indicators (KPIs) for success?** *Ensures future changes align with what matters most (sales, signups, traffic, etc.).*
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2. Stakeholders & Roles

- **Who are the main points of contact (client, stakeholders, etc.)?** *Ensures clear communication lines and approval workflows.*
 - **Who manages the website now, and who will after handover?** *Defines responsibilities for content, technical, and business decisions.*
 - **Who participated in the original planning/discovery phase?** *Provides context for historical decisions and future reference.*
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3. Ownership & Legal

- **Do we fully own the website, code, and content after payment?** *Prevents disputes over intellectual property and future access.*
 - **Are there ongoing contracts (hosting, support, SLAs, etc.)?** *Identifies recurring obligations and costs.*
 - **Are there paid themes or plugins?** *List all with license info, renewal dates, and transfer steps.*
 - **How is user data handled?** *Ensures compliance with privacy regulations (GDPR, CCPA, etc.).*
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4. Domain & Hosting

- **What is the domain name and registrar?** *Include login credentials, renewal date, and DNS management details.*
 - **Who is the hosting provider and what is the plan?** *Include login, plan limits, renewal date, server type (shared, VPS, managed), and OS/version.*
 - **Are there custom DNS records or CDN settings?** *Document all A, CNAME, MX, TXT, and CDN configurations.*
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5. Server & Infrastructure

- **Server IP address(es) and control panel access (cPanel, Plesk, etc.)**
 - **Are there specific server configurations (PHP version, memory limits, caching, etc.)?**
 - **Is there a Web Application Firewall (WAF) or other security layers?**
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6. Database

- **Database host, type, version, name(s), and user credentials**
 - **phpMyAdmin or other DB management tool access**
 - **Are there custom tables or modifications beyond standard WordPress?**
 - **Backup schedule and restore procedures for the database**
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7. WordPress Access

- **Admin URL, usernames, and passwords for all admin/editor accounts**
 - **2FA or security plugins in use**
 - **List of all user roles and permissions**
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8. FTP/SFTP/SSH Access

- **FTP/SFTP/SSH host, port, credentials, and key pairs**
 - **Location of authorized_keys and file/folder permissions**
 - **Root directory path for WordPress installation**
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9. Email

- **Email provider and account credentials**
 - **SMTP settings and email forwarding/alias rules**
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10. Plugins, Themes & Custom Code

- List of all active/inactive plugins (with versions and license keys)
 - List of all installed themes (active/inactive, parent/child, customizations, documentation)
 - Custom plugins/themes (location, documentation, update schedule)
 - Custom code snippets (functions.php, code snippet plugins, custom CSS/JS, etc.)
 - Are there custom post types, taxonomies, or fields (e.g., via ACF)?
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11. Integrations & Third-Party Services

- List all connected services (payments, analytics, email, CRM, APIs, etc.)
 - Login credentials or API keys for each service
 - Ownership transfer steps for each account
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12. Backups & Recovery

- Backup solution in use (plugin, server, third-party)
 - Backup schedule, retention policy, and storage location
 - Restore procedures and last tested date
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13. Security

- Security plugins and configurations (firewall, malware scanning, login limits, etc.)
 - SSL certificate details (provider, expiry, renewal, auto-renewal)
 - User roles and permissions management (Principle of Least Privilege)
 - Any past security issues and resolutions
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14. Performance & Caching

- Caching plugins or server-side caching
 - CDN provider and credentials
 - Performance monitoring tools and procedures for clearing caches
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15. Analytics & SEO

- Google Analytics/Tag Manager/Search Console access
 - SEO plugin settings (Yoast, RankMath, etc.)
 - Sitemap location
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16. Environments & Deployment

- Development/staging/production environments (URLs, access, sync process)
 - Deployment process (manual, CI/CD, scripts, documented steps)
 - Version control (Git repo URL, access, branching strategy, commit history)
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17. Documentation & Training

- Location of project documentation/readme, technical specs, style guides
- Availability of training sessions or video walkthroughs
- Known issues, technical debt, and support contacts

18. Support, Maintenance & Monitoring

- Maintenance schedule (updates, backups, testing)
- Uptime/performance monitoring tools and alert contacts
- Post-handover support period, communication channels, and hourly rates

19. Final Handover & Exit Interview

- Schedule a formal handover meeting and confirm all accesses
- Use inventory tables as checklists; new owner logs into every service
- Change all passwords and enable 2FA
- Remove old users and revoke previous developer access
- Exit Interview Questions:
 - What are the most fragile or complex parts of the site?
 - If you had more time, what would you improve?
 - Are there any quirks, oddities, or manual workarounds?
 - What were the biggest challenges and lessons learned?

20. Appendix: Inventory Tabular Data

Master Credentials & Services Inventory Table

SERVICE	DETAILS	ACCESS	USER	EVENT/ACTION	TOKENS	COSTS	DUE BY
Content/Assets	CMS	WordPress Admin	new_admin_user	Shared via Bitwarden	--	Free	N/A
SSH/Domain	Registrar	GoDaddy	owner@org.com	To be reset by new owner	--	\$20	2025-10-15
Hosting	Linux/Web	SiteGround	owner@org.com	To be reset by new owner	--	\$299	2025-09-01
Payment	Processing	Stripe	finance@org.com	Existing account	pk_live_...	TBD	--
Cloud	CDN/Firewall	CloudFlare	tech@org.com	To be reset by new owner	GLOBAL_SECRET	\$12	Monthly
Email	Marketing	MailChip	marketing@org.com	Existing account	API_KEY	\$50	Monthly
Plugin	License: PRO	Adv. Custom Fields	dev@co.com	Transfer license	LICENSE_TOKEN	\$25	2025-07-22

Plugin & Theme Audit Table

NAME	KIND	VERSION	PURPOSE	COST	TOKEN	NOTICE
Astra	Parent Theme	4.1.5	Base theme framework	Freemium	PRO license active	Core visual framework; DO NOT edit directly.
Astra Child	Child Theme	1.x	Holds all custom CSS/PHP	Custom	N/A	All customizations should be made here.
WooCommerce	Plugin	8.0.1	E-commerce functionality	Free	N/A	Critical for sales; complex settings.
Wordfence Security	Plugin	^7.9.2	Firewall & malware scan	Premium	Active - Renews 2025-01-30	Firewall rules are configured; DO NOT deactivate.
WP Rocket	Plugin	3.12.5	Caching & performance	Premium	Active - Renews 2025-03-12	Key for site speed. Purge cache after changes.
Advanced Custom Fields PRO	Plugin	6.1.6	Manages all custom fields	Premium	Missing/Expired	CRITICAL RISK - Site layouts depend on this. CANNOT UPDATE WITHOUT a valid license.
Really Simple SSL	Plugin	7.0.5	Manages SSL certificate	Free	N/A	Redundant - Hosting provides SSL. Can likely be removed after verification.
Classic Editor	Plugin	~1.6.3	Disables Gutenberg editor	Free	N/A	Indicates site may not be compatible with modern block editor. Creates technical debt.

Tip: Attach all relevant files (configurations, SSH keys, documentation, license files) and ensure all credentials are up to date and securely stored.

Conclusion

A robust handover ensures the new owner has full control, understands the website's architecture and processes, and is equipped to maintain and grow the site with confidence. Use this checklist to guide the transition, reduce risk, and set the stage for long-term success.