

WordPress Transfer Workflows

This repository provides a comprehensive suite of documents to facilitate a smooth and secure WordPress project handoff.

The docs are designed for use at varied stages of the process, from initial due diligence to final ownership transfer.

Transfer Ownership Document

There are three core docs in this suite, each serves a distinct purpose; providing utility in specific staged scenarios.

Below outlines the recommended usage for each document, their ideal use-cases, brief intent summaries, and file links.

Compare Documents Datatable

This datatable summarizes the three core docs, outlining purpose, usage, responsibility, and doc source location routes.

Each document targets a specific phase of the WordPress ownership transfer workflow process. Broken into three stages.

Docs	Purpose	Intent	Use Cases
detailedinfo	In-depth technical and operational guide.	Equip developers w/comprehensive transfer guardrails.	Use <u>during the initial review</u> for a deep technical audit.
taskprogress	Detailed reviewable handoff task indexes.	Track and complete every required handoff task.	Use <u>throughout the handoff</u> to ensure tasks are not skipped.
finalreviews	Complete handoff tasks review checklist.	Ensure all steps/tasks are finalized & verified.	Use <u>during final handoff</u> to confirm every task is completed.

Comprehensive Detailed Info

A summary of each comprehensive docs, including detailed descriptions, intended use-cases, and ideal use-case scenarios.

Each doc is designed to address specific aspects for a phased transfer process: **Introduction, Execution, Completion.**

1. Detailed Info

- **PURPOSE:** This is a comprehensive, developer-focused guide that provides a deep dive into the technical and operational aspects of a WordPress project. It is designed to be a single source of truth for the incoming development team.
- **INTENDS:** To provide a detailed, actionable guide for developers, covering everything from high-level strategy to granular technical details. It includes practical templates and checklists to ensure a thorough and secure handoff.
- **USECASE:** Once you have a high-level understanding of the project, use this guide for a deep dive into the technical and operational details. This document is essential for the incoming development team to fully understand the project's architecture and workflows.

2. Task Progress

- **PURPOSE:** This document is a high-level, indexed questionnaire that serves as a due diligence protocol. It is designed to be used at the beginning of the handoff process to assess the project's health and identify potential risks.
- **INTENDS:** To provide a structured set of questions that enable the incoming owner or team to proactively identify, assess, and mitigate the myriad risks inherent in the transition process.
- **USECASE:** Start with this document. It's a high-level questionnaire that will help you assess the overall state of the project and identify potential risks early in the process. This is the ideal document for initial due diligence.

3. Final Reviews

- **PURPOSE:** This document is a comprehensive checklist that covers all the essential steps of a WordPress project handoff. It is designed to be used as a practical tool during the handoff process to ensure that no steps are missed.
- **INTENDS:** To provide a structured framework that guides the handoff process, ensuring that all critical tasks are completed and nothing is overlooked.
- **USECASE:** Use this checklist throughout the handoff process to track progress, confirm task completion, and facilitate communication between teams.