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**WordPress Project Handover: Comprehensive Due Diligence Checklist**



* **successful WordPress handover is not just about shar ing files and passwords—it's a process of tr ansfer r ing knowledge,**

**responsibility, and control. This checklist com bines str ategic, technical, oper ational, and legal consider ations to ensure a seamless tr ansition and m inim ize r isks for the new owner.**



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1. **Project Overview & Intent**



**What is the pr im ar y purpose of the website? *Clarifies business goals and inform s future decisions (e.g., e- commerce, lead generation, content hub).***



**Are there unique business rules or wor kflows? *Identifies custom logic or processes that may im pact maintenance.***



**How has the website evolved over tim e? *Highlights major pivots, technical debt, or legacy features.***



**What are the key per form ance indicators (KPIs) for success? *Ensures future changes align w ith w hat matters m ost (sales, signups, traffic, etc.).***



1. **Stakeholders & Roles**



**Who are the m ain points of contact (client, stakeholders, etc. )? *Ensures clear comm unication lines and approval work flows.***



**Who m anages the website now, and who will after handover ? *Defines responsibilities for content, technical, and business decisions.***



**Who par ticipated in the or iginal planning/discover y phase? *Prov ides context for historical decisions and future reference.***



1. **Ownership & Legal**

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**Do we fully own the website, code, and content after paym ent? *Prevents disputes over intellectual property and future access.***



**Are there ongoing contracts (hosting, suppor t, SLAs, etc. )? *Identifies recurring obligations and costs.***



**Are there paid them es or plugins? *List all w ith license info, renewal dates, and transfer steps.***



**How is user data handled? *Ensures com pliance w ith privacy regulations (GDPR, CCPA, etc.).***



1. **Domain & Hosting**



**What is the dom ain nam e 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.***



1. **Server & Infrastructure**



**Ser ver IP address(es) and control panel access (cPanel, Plesk, etc. )**



**Are there specific ser ver configurations (PHP version, m emor y lim its, caching, etc. )?**



**Is there a Web Application Firewall (WAF) or other secur ity layers?**



1. **Database**



**Database host, type, version, nam e(s), and user credentials**



**phpMyAdm in or other DB m anagem ent tool access**



**Are there custom tables or modifications beyond standard WordPress?**



**Backup schedule and restore procedures for the database**



1. **WordPress Access**



**Adm in URL, usernam es, and passwords for all adm in/editor accounts**



**2FA or** **secur ity plugins in use**



**List of all user roles and perm issions**



1. **FTP/SFTP/SSH Access**



**FTP/SFTP/SSH host, por t, credentials, and key pairs**



**Location of author ized\_keys and file/folder perm issions**



**Root director y path for WordPress installation**



1. **Email**



**Em ail provider and account credentials**



**SMTP settings and em ail forwarding/alias rules**



1. **Plugins, Themes & Custom Code**

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**List of all active/inactive plugins (with versions and license keys)**



**List of all installed them es (active/inactive, parent/child, custom izations, docum entation)**



**Custom plugins/them es (location, docum entation, update schedule)**



**Custom code snippets (functions. php, code snippet plugins, custom CSS/JS, etc. )**



**Are there custom post types, taxonom ies, or fields (e. g. , via ACF)?**



1. **Integrations & Third-Party Services**



**List all connected ser vices (paym ents, analytics, em ail, CRM, APIs, etc. )**



**Login credentials or API keys for each ser vice**



**Ownership transfer steps for each account**



1. **Backups & Recovery**



**Backup solution in use (plugin, ser ver, third-par ty)**



**Backup schedule, retention policy, and storage location**



**Restore procedures and last tested date**



1. **Security**



**Secur ity plugins and configurations (firewall, m alware scanning, login lim its, etc. )**



**SSL cer tificate details (provider, expir y, renewal, auto-renewal)**



**User roles and perm issions m anagem ent (Pr inciple of Least Pr ivilege)**



**Any past secur ity issues and resolutions**



1. **Performance & Caching**



**Caching plugins or ser ver-side caching**



**CDN provider and credentials**



**Per form ance monitor ing tools and procedures for clear ing caches**



1. **Analytics & SEO**



**Google Analytics/Tag Manager/Search Console access**



**SEO plugin settings (Yoast, RankMath, etc. )**



**Sitem ap location**



1. **Environments & Deployment**



**Developm ent/staging/production environm ents (URLs, access, sync process)**



**Deploym ent process (m anual, CI/CD, scr ipts, docum ented steps)**



**Version control (Git repo URL, access, branching strategy, comm it histor y)**



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1. **Documentation & Training**



**Location of project docum entation/readm e, technical specs, style guides**



**Availability of training sessions or video walkthroughs**



**Known issues, technical debt, and suppor t contacts**



1. **Support, Maintenance & Monitoring**



**Maintenance schedule (updates, backups, testing)**



**Uptim e/per form ance monitor ing tools and aler t contacts**



**Post-handover suppor t per iod, communication channels, and hourly rates**



1. **Final Handover & Exit Interview**



**Schedule a form al handover m eeting and confirm all accesses**



**Use inventor y tables as checklists; new owner logs into ever y ser vice**



**Change all passwords and enable 2FA**



**Remove old users and revoke previous developer access**



**Exit Inter view Questions:**



**What are the most fr agile or complex par ts of the site?**



**If you had more tim e, what would you improve?**



**Are there any quir ks, oddities, or m anual wor karounds?**



**What were the biggest challenges and lessons lear ned?**



1. **Appendix: Inventory Tabular Data**

**Master Credentials & Services Inventory Table**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **SERVICE** | **DETAILS** | **ACCESS** | **USER** | **EVENT/ACTION** | **TOKENS** | **COSTS** | **DUE BY** |
|  |  |  |  |  |  |  |  |
| **Content/Assets** | **CMS** | [**WordPress**](https://yourdomain.com/wp-admin) | new\_admin\_user | **Shared via** | **--** | **Free** | **N/A** |
|  |  | **Adm in** |  | **Bitwarden** |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  | **To be reset by** |  |  | 2025- |
| **SSH/Dom ain** | **Registr ar** | **GoDaddy** | **owner @org.com** | **new owner** | **--** | **$20** | 10-15 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | **To be reset by** |  |  | 2025- |
| **Hosting** | **Linux/Web** | **SiteGround** | **owner @org.com** | **new owner** | **--** | **$299** | 09-01 |
|  |  |  |  |  |  |  |  |
|  |  |  |  | **Existing** |  |  |  |
| **Paym ent** | **Processing** | **Str ipe** | **finance@org.com** |  | **pk\_live\_…** | ***TBD*** | **--** |
|  |  |  |  | **account** |  |  |  |
|  |  |  |  |  |  |  |  |

**To be reset by**

**Cloud** **CDN/Firewall** **CloudFlare** **tech@org.com**

**new owner**



GLOBAL\_SECRET

**$12** **Monthly**

**Existing**

**Em ail** **Mar keting** **MailChip** **m ar keting@org.com**

**account**



API\_KEY

**$50** **Monthly**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | [**Adv.**](https://www.advancedcustomfields.com/my-account/) |  |  |  | 2025- |  |
| **Plugin** | **License:** PRO[**Custom**](https://www.advancedcustomfields.com/my-account/) | **dev@co.com** | **Tr ansfer license** | LICENSE\_TOKEN **$25** | 07-22 |  |
|  |  |  |  |  |  |

**Fields**

**Plugin & Theme Audit Table**

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|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **NAME** | **KIND** | **VERSION** | **PURPOSE** | **COST** | **TOKEN** | **NOTICE** |
|  |  |  |  |  |  |  |
| **Astr a** | **Parent** | 4.1.5 | **Base them e** | **Freem ium** | **PRO license** | **Core visual fr am ewor k; DO NOT edit** |
|  | **Them e** |  | **fr am ewor k** |  | **ac tive** | **direc tly.** |
|  |  |  |  |  |  |  |
|  |  |  | **Holds all** |  |  |  |
| **Astr a Child** | **Child** | 1.x | **custom** | **Custom** | N/A | **All custom iz ations should be m ade** |
|  | **Them e** |  |  |  |  | **here.** |
|  |  |  | **CSS/PHP** |  |  |  |
|  |  |  |  |  |  |  |
| **WooComm erce** | **Plugin** | 8.0.1 | **E-comm erce** | **Free** | N/A | **Cr itical for sales; complex settings.** |
|  |  |  | **func tionality** |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  | **Firewall &** |  | **Ac tive -** |  |
| **Wordfence** | **Plugin** | ^7.9.2 | **m alware** | **Prem ium** | **Renews 2025-** | **Firewall rules are configured; DO NOT** |
| **Secur ity** |  |  |  |  |  | **deac tivate.** |
|  |  |  | **scan** |  | **01-30** |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  | **Ac tive -** |  |
| **WP Rocket** | **Plugin** | 3.12.5 | **Caching &** | **Prem ium** | **Renews 2025-** | **Key for site speed. Purge cache after** |
|  |  |  | **per for m ance** |  |  | **changes.** |
|  |  |  |  |  | **03-12** |  |
|  |  |  |  |  |  |  |
| **Advanced** |  |  | **Manages all** |  |  | **CRITICAL RISK - Site layouts depend** |
| **Custom Fields** | **Plugin** | 6.1.6 | **custom** | **Prem ium** | **Missing/Expired** | **on this. CANNOT UPDATE WITHOUT** |
| **PRO** |  |  | **fields** |  |  | **a valid license.** |
|  |  |  |  |  |  |  |
|  |  |  | **Manages** |  |  | **Redundant - Hosting provides SSL.** |
| **Really Simple** | **Plugin** | 7.0.5 | **SSL** | **Free** | N/A | **Can likely be removed after** |
| **SSL** |  |  |  |  |  |  |
|  |  |  | **cer tificate** |  |  | **ver ification.** |
|  |  |  |  |  |  |  |
|  |  |  | **Disables** |  |  | **Indicates site m ay not be compatible** |
| **Classic Editor** | **Plugin** | ~1.6.3 | **Gutenberg** | **Free** | N/A | **with moder n block editor. Creates** |
|  |  |  | **editor** |  |  | **technical debt.** |



**Tip: Attach all relevant files (configur ations, SSH keys, docum entation, license files) and ensure all credentials are up to date and securely stored.**



**Conclusion**

* **robust handover ensures the new owner has full control, understands the website's architec ture and processes, and is equipped**

**to m aintain and grow the site with confidence. Use this checklist to guide the tr ansition, reduce r isk, and set the stage for long-ter m success.**

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