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**The Definitive WordPress Handover Protocol**



**A Comprehensive Due Diligence Questionnaire**

**Introduction**

**The handover of a WordPress projec t is a cr itical inflec tion point in the lifecycle of a digital asset. It is frequently m isconstrued as a simple, tr ansac tional event**

**involving the exchange of files & passwords.** **This perspec tive is dangerously incomplete. A successful handover is not an event but a comprehensive process of**

**knowledge tr ansfer, moving far beyond the deliver y of technical components to encompass the full str ategic, legal, & oper ational context of the website. The ultim ate objec tive is to de-r isk the tr ansition by elim inating dependency on the depar ting developer, thereby empower ing the new owner with complete & unencum bered autonomy over their digital proper ty.**

**The stakes of a poorly executed handover are exceptionally high. An incomplete tr ansfer can precipitate a cascade of negative consequences that m anifest long after the or iginal developer has depar ted. These r isks include:**



**Severe secur ity vulnerabilities stemm ing from linger ing, unauthor ized access to cr itical systems.**



**Operational downtim e caused by unknown dependencies or undocum ented, fr agile wor kflows.**



**Significant legal liabilities ar ising from am biguous ownership of intellec tual proper ty or non-compliance with data pr ivacy regulations.**



**Escalating future costs as the new team gr apples with undocum ented technical debt that is difficult & expensive to rem ediate.**

**This guide provides a struc tured, exhaustive set of questions designed to ser ve as a definitive due diligence protocol for any WordPress projec t handover. It is**

**engineered to be a pr ac tical tool, enabling the incom ing owner or team to proac tively identify, assess, & m itigate the myr iad r isks inherent in the tr ansition process. By system atically addressing each area—from high-level str ategy to the most gr anular technical detail—the new owner can ensure a truly complete & seamless tr ansfer of control, establishing a fir m foundation for the future m anagem ent, m aintenance, & growth of the website.**



**Part I: Strategic & Commercial Foundation**

**Before any technical exam ination of the website can be m eaningful, it is imper ative to establish a deep understanding of its business context. The technical**

**architec ture, features, & code are m erely instrum ents designed to ser ve a str ategic pur pose. Their quality & appropr iateness can only be judged against the business goals they were intended to achieve. This sec tion provides the questions necessar y to uncover the why behind the website, clar ifying its pur pose, histor y, stakeholders, & the legal fr am ewor k that gover ns it.**

**A. Project Purpose & History**



**What was the or iginal business problem this website was built to solve? What were the pr im ar y goals & objectives defined at the project' s inception?**

**Who was the target audience defined at the project' s outset, & has that audience evolved over tim e?**

**Can you provide a br ief histor y of the project, including key m ilestones, m ajor feature additions, or significant strategic pivots?**

**What were the key per form ance indicators (KPIs) used to m easure the website' s success?**

**B. Stakeholder & Audience Landscape**



**Who are the key internal & external stakeholders involved with the website? Who has the final author ity for approving changes?**

**Which stakeholders were involved in the or iginal ' Discover y' or research phase of the project?**

**C. Commercial & Legal Framework**



**Can you confirm in wr iting that upon final paym ent, our organization will have 100% ownership of the website, its design, all custom -developed code, & all content created specifically for the project?**

**Are there any third-par ty or prem ium software licenses (for them es, plugins) that need to be transferred or repurchased? Please provide a comprehensive list of all such software, including license keys, or iginal purchase dates, renewal dates, & annual costs.**

**Are there any ongoing ser vice level agreem ents (SLAs), hosting contracts, or other contractual obligations with your company or external third par ties that we will be inher iting?**

**What data pr ivacy agreem ents or policies are in place to comply with regulations such as GDPR or CCPA? Where is user data stored, & what m easures are in place to protect it?**



**Part II: The Keys to the Kingdom: Access, Credentials, & Third-Party Services**

**This sec tion constitutes a non-negotiable inventor y of all access points required to control the website & its sur rounding ecosystem . The pr im ar y goal is to achieve full, exclusive adm inistr ative control over ever y component. A handover cannot be considered complete until ever y credential has been securely tr ansfer red & the previous developer 's access has been system atically & ver ifiably revoked from ever y platfor m . Failure to do so represents a cr itical & ongoing secur ity r isk.**

**A. Core Platform Credentials**



**Please provide credentials for a new, unique Adm inistrator-level user for the WordPress dashboard.**

**What are the login details for the website' s hosting control panel (e. g. , cPanel, Plesk, or a custom provider dashboard)?**

**What are the login details for the dom ain registrar (e. g. , GoDaddy, Nam echeap) where the site' s dom ain nam e is m anaged?**

**B. Infrastructure & Development Access**



**Please provide SFTP (Secure File Transfer Protocol) or SSH (Secure Shell) credentials for direct file access to the ser ver.**

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**What are the credentials for direct database access, including the Database Nam e, Usernam e, Password, & Hostnam e?**

**C. Integrated Services & APIs**



**Please provide a comprehensive list of all third-par ty ser vices integrated with the site. This must include, but is not lim ited to: Paym ent Gateways (e. g. , Str ipe, PayPal), Content Deliver y Networ ks (CDNs) like Cloudflare, Em ail Mar keting Platforms (e. g. , Mailchimp, Conver tKit), CRM systems, Analytics platforms (e. g. , Google Analytics, Google Tag Manager ), & any other ser vices connected via an API key.**



**For each ser vice identified, what are the login credentials or API keys, & what is the process for transferr ing ownership of these accounts to us?**

**D. The Secure Transfer Process**

**ACTION ITEMS:**



**Insist on Secure Credential Shar ing. Under no circumstances should passwords or API keys be sent in plain text via em ail. Use a secure shar ing m ethod, such as a one-tim e, self-destruc ting note ser vice (e. g. , Pr ivnote) or a shared vault within a reputable password m anager (e. g. , 1Password, Bitwarden).**

**Imm ediate Credential Rotation & 2FA Activation. Upon receiving all credentials, the new owner 's first ac tion should be to log in to ever y single ser vice, change the password to a new, strong, & unique one, & enable two-fac tor authentication (2FA) wherever possible.**

**System atic Revocation of Old Access. The final & most crucial step of the access tr ansfer is to system atically remove the previous developer 's user accounts from ever y platfor m : WordPress, hosting, dom ain registr ar, CDN, & all other third-par ty ser vices. The handover is not complete until this de-provisioning process is finished.**

**Master Credentials & Services Inventory**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | **Password** |  |
|  |  |  | **API Key (if** | **License/Subscr** |
| **Ser vice/PlatformPurpose** | **Login URL** | **Usernam e / Account Em ail** | **Transfer** |  |
|  |  |  | **applicable)** | **Cost** |
|  |  |  | **Method** |  |
|  |  |  |  |  |

**Content**

**WordPress Adm in** **https: //yourdom ain. com /wp-adm in Managem ent**

new\_admin\_user



**Shared**

**via** **--** **--**

**Bitwarden**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | **To be** |  |
| **Dom ain** |  |  | **reset by** |  |
| **GoDaddy** | **https: //dcc. godaddy. com /** | **owner @yourcompany. com** | **--** | **$19.99/year** |
| **Registr ar** |  |  | **new** |  |
|  |  |  | **owner** |  |
|  |  |  |  |  |
|  |  |  | **To be** |  |
| **SiteGround** |  |  | **reset by** |  |
| **Web Hosting** | **https: //login. siteground. com /** | **owner @yourcompany. com** | **--** | **$299/year** |
| **Hosting** |  |  | **new** |  |
|  |  |  | **owner** |  |
|  |  |  |  |  |

**Paym ent** **Existing**

**Str ipe** **https: //dashboard. str ipe.com /** **finance@yourcompany. com**

**Processing** **account**



pk\_live\_...

**Tr ansac tion fees**

**To be**

**CDN /** **reset by**

**Cloudflare** **https: //dash. cloudflare. com /** **tech@yourcompany. com**

**Firewall** **new**

**owner**



[Global API

Key] **$20/month**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Mailchimp** | **Em ail** | **https: //login. m ailchimp. com /** | **m ar keting@yourcompany. comExisting** | [API Key] | **$50/month** |
|  | **Mar keting** |  | **account** |  |  |
|  |  |  |  |  |  |

**Advanced**

**Plugin** [**https: //www. advancedcustom fields. com /my-**](https://www.advancedcustomfields.com/my-account/) **Tr ansfer**

**Custom Fields** **developer @oldcompany. com**

**License** **account/** **license**

**PRO**



[License

Key]

**$49/year**

**Part III: Deconstructing the Technical Architecture**

**Understanding how a website was built is a prerequisite for being able to effec tively m aintain, troubleshoot, & extend it. This sec tion focuses on creating a**

**comprehensive bluepr int of the site's technical construc tion. The questions are designed to uncover the developm ent pr ac tices, tools, & struc tur al decisions that define the website's func tionality and, by extension, its future m aintainability.**

**A. The Code Repository & Version Control**



**Is the website' s code m anaged in a version control system like Git? If so, please provide access to the repositor y (e. g. , on GitHub, Bitbucket, or GitLab).**

**What is the branching strategy used in the repositor y (e. g. , GitFlow, feature branches)? Which branch represents the code currently running on the live production site?**

**Can you confirm that the repositor y contains the complete & unabr idged histor y of the project' s developm ent?**

**B. Theme & Parent/Child Theme Structure**



**What them e is the site built on? Is it a pre-built comm ercial them e from a m ar ketplace, or is it a fully custom them e built from scratch?**

**If it' s a comm ercial them e, is a child them e being used for all custom izations? Can you provide explicit confirm ation that no modifications have been m ade directly to the parent them e' s files?**

**Where are the them e' s or iginal purchase files & official docum entation located?**

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**C. Plugin Ecosystem Audit**



**Please provide a complete list of all installed plugins. For each plugin, can you br iefly explain its purpose & the rationale for why it was chosen over alternatives?**

**Which of these plugins are prem ium (paid) versions? Please provide the associated license keys & account inform ation required to receive future updates & technical suppor t.**

**Are there any custom -built plugins developed specifically for this site? If so, where is their source code m anaged, & is there docum entation for their functionality?**

**Are there any known conflicts between plugins in the current stack, or are there any plugins known to cause per form ance issues?**

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