next8n

HANDOVER PROCESS DIAGRAM

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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Professional Workflow Delivery & Transfer

Complete Handover Flow

```
flowchart TB
    subgraph PREP[" PREPARATION PHASE"]
        P1["Duplicate workflow<br/>(Test  Production)"]
        P2["Remove test data"]
        P3["Clean up node names"]
        P4["Add sticky notes"]
        P5["Verify all connections"]
        P6["Enable logging"]

        P1 --> P2 --> P3 --> P4 --> P5 --> P6
    end

    subgraph DOCS[" DOCUMENTATION PHASE"]
        D1["Create workflow overview"]
        D2["Record Loom walkthrough"]
        D3["Write credential guide"]
        D4["Create troubleshooting FAQ"]
        D5["Prepare handover deck"]

        D1 --> D2 --> D3 --> D4 --> D5
    end

    subgraph TRANSFER[" TRANSFER PHASE"]
        T1["Schedule handover call"]
        T2["Walk through live system"]
        T3["Transfer any credentials"]
        T4["Swap test  prod creds"]
        T5["Enable production workflow"]

        T1 --> T2 --> T3 --> T4 --> T5
    end

    subgraph CONFIRM[" CONFIRMATION PHASE"]
        C1["Client tests system"]
        C2["Verify first executions"]
        C3["Address any questions"]
        C4["Get formal acceptance"]
        C5["Send final invoice"]

        C1 --> C2 --> C3 --> C4 --> C5
    end

    PREP --> DOCS --> TRANSFER --> CONFIRM

    style PREP fill:#e3f2fd
    style DOCS fill:#fff3e0
    style TRANSFER fill:#e8f5e9
    style CONFIRM fill:#f3e5f5
```

Handover Call Flow

```
sequenceDiagram
    participant Y as  You
    participant C as  Client
    participant N as  n8n

    Note over Y,N: PRE-CALL PREPARATION
    Y->>Y: Prepare demo environment
    Y->>Y: Have documentation ready
    Y->>C: Send calendar invite with agenda

    Note over Y,N: HANDOVER CALL (30-60 min)

    rect rgb(230, 245, 255)
        Note over Y,C: Part 1: Overview (10 min)
        Y->>C: Review project scope
        Y->>C: Confirm deliverables met
        Y->>C: Show high-level architecture
    end

    rect rgb(255, 245, 230)
        Note over Y,C: Part 2: Live Demo (15 min)
        Y->>N: Trigger test execution
        Y->>C: Walk through each step
        Y->>C: Show input  output flow
        Y->>C: Demonstrate error handling
    end

    rect rgb(230, 255, 230)
        Note over Y,C: Part 3: Monitoring (10 min)
        Y->>N: Show execution history
        Y->>C: Explain how to check logs
        Y->>C: Show error notifications
        Y->>C: Demonstrate the logging sheet
    end

    rect rgb(245, 230, 255)
        Note over Y,C: Part 4: Maintenance (10 min)
        Y->>C: Explain what needs updating
        Y->>C: Show how to disable if needed
        Y->>C: Discuss backup strategy
        Y->>C: Cover support options
    end

    rect rgb(255, 230, 230)
        Note over Y,C: Part 5: Q&A (10 min)
        C->>Y: Ask questions
        Y->>C: Answer and clarify
        Y->>C: Confirm next steps
    end

    Note over Y,N: POST-CALL
```

```
Y->>C: Send recording link
Y->>C: Send documentation package
C->>Y: Confirm acceptance
```

Documentation Package Contents

```
flowchart TB
    subgraph PACKAGE[" Handover Package"]
        subgraph VIDEOS["Video Content"]
            V1["Workflow Walkthrough<br/>(5-10 min Loom)"]
            V2["Credential Setup Guide<br/>(2-3 min Loom)"]
            V3["Troubleshooting Guide<br/>(3-5 min Loom)"]
        end

        subgraph WRITTEN[" Written Docs"]
            W1["Project Overview<br/>(1-pager)"]
            W2["Technical Documentation<br/>(Detailed)"]
            W3["FAQ Document"]
            W4["Contact & Support Info"]
        end

        subgraph EXPORTS["Technical Assets"]
            E1["Workflow JSON Export"]
            E2["Backup Copy"]
            E3["Credential List<br/>(names only, not values)"]
            E4["Integration Checklist"]
        end

        subgraph VISUAL["Visual Aids"]
            VA1["Workflow Screenshot/PDF"]
            VA2["Data Flow Diagram"]
            VA3["Architecture Overview"]
        end
    end

    style VIDEOS fill:#e3f2fd
    style WRITTEN fill:#fff3e0
    style EXPORTS fill:#e8f5e9
    style VISUAL fill:#f3e5f5
```

Credential Transfer Security

```
flowchart TB
    subgraph SCENARIO1[" BEST: Client Enters Own Credentials"]
        S1A["Client creates API accounts"]
        S1B["Client generates keys"]
        S1C["Client enters in n8n directly"]
        S1D["You never see raw keys"]

        S1A --> S1B --> S1C --> S1D
    end

    subgraph SCENARIO2[" OKAY: Secure Transfer Required"]
        S2A["Client shares via secure vault"]
        S2B["Use 1Password/Bitwarden"]
        S2C["Generate one-time link"]
        S2D["Link expires after use"]
        S2E["You enter, then delete"]

        S2A --> S2B --> S2C --> S2D --> S2E
    end

    subgraph NEVER[" NEVER DO"]
        N1["Share via email"]
        N2["Share via Slack/Teams"]
        N3["Share via text message"]
        N4["Store in plain text"]
        N5["Include in documentation"]
    end

    style SCENARIO1 fill:#e8f5e9,stroke:#2e7d32
    style SCENARIO2 fill:#fff3e0,stroke:#ff9800
    style NEVER fill:#ffebee,stroke:#c62828
```

Environment Transition

```
flowchart LR
    subgraph DEV[" Development/Test"]
        DEV_WF["Test Workflow"]
        DEV_CREDS["Test Credentials"]
        DEV_DATA["Sample Data"]
    end

    subgraph HANDOVER[" Handover Actions"]
        H1["Export workflow"]
        H2["Create production copy"]
        H3["Swap credentials"]
        H4["Remove test data"]
        H5["Enable workflow"]
    end

    subgraph PROD[" Production"]
        PROD_WF["Production Workflow"]
        PROD_CREDS["Production Credentials"]
        PROD_DATA["Live Data"]
    end

    DEV --> HANDOVER --> PROD

    style DEV fill:#fff3e0
    style HANDOVER fill:#e3f2fd
    style PROD fill:#e8f5e9
```

Handover Checklist Visualization

```
flowchart TB
    subgraph BEFORE[" Before Handover Call"]
        B1[" Workflow tested and working"]
        B2[" All nodes properly named"]
        B3[" Sticky notes added"]
        B4[" Error handling in place"]
        B5[" Logging configured"]
        B6[" Documentation complete"]
        B7[" Loom videos recorded"]
        B8[" Backup exported"]
    end

    subgraph DURING[" During Handover Call"]
        D1[" Walk through architecture"]
        D2[" Demo live execution"]
        D3[" Show monitoring"]
        D4[" Explain maintenance"]
        D5[" Answer questions"]
        D6[" Transfer credentials"]
        D7[" Enable production"]
    end

    subgraph AFTER[" After Handover Call"]
        A1[" Send recording"]
        A2[" Send documentation"]
        A3[" Verify first live runs"]
        A4[" Get acceptance confirmation"]
        A5[" Send final invoice"]
        A6[" Discuss retainer if applicable"]
        A7[" Archive project"]
    end

    BEFORE --> DURING --> AFTER

    style BEFORE fill:#e3f2fd
    style DURING fill:#fff3e0
    style AFTER fill:#e8f5e9
```

Acceptance Criteria Flow

```
flowchart TB
    subgraph REVIEW[" Review Against Scope"]
        R1["Check each deliverable"]
        R2["Verify success criteria"]
        R3["Confirm integrations work"]
        R4["Validate outputs"]
    end

    subgraph DECISION{"All Criteria Met?"}
    end

    subgraph ACCEPTED[" ACCEPTED"]
        A1["Client signs off"]
        A2["Final invoice sent"]
        A3["Project closes"]
    end

    subgraph NOT_ACCEPTED[" NOT YET"]
        N1["Document gaps"]
        N2["Agree on fixes"]
        N3["Timeline for completion"]
        N4["Return to development"]
    end

    REVIEW --> DECISION
    DECISION -->|"Yes"| ACCEPTED
    DECISION -->|"No"| NOT_ACCEPTED
    NOT_ACCEPTED --> REVIEW

    style ACCEPTED fill:#e8f5e9
    style NOT_ACCEPTED fill:#fff3e0
```

Post-Handover Support Period

```
flowchart TB
    subgraph SUPPORT_PERIOD[" Post-Launch Support (First 7-14 Days)"]
        SP1["Monitor all executions"]
        SP2["Watch for errors"]
        SP3["Be responsive to questions"]
        SP4["Fix bugs quickly"]
        SP5["Document any issues"]
    end

    subgraph INCLUDED[" Included in Project"]
        I1["Bug fixes"]
        I2["Minor adjustments"]
        I3["Configuration tweaks"]
        I4["Quick questions"]
    end

    subgraph NOT_INCLUDED[" New Scope"]
        NI1["New features"]
        NI2["New integrations"]
        NI3["Major changes"]
        NI4["Extended support"]
    end

    SUPPORT_PERIOD --> INCLUDED
    SUPPORT_PERIOD --> NOT_INCLUDED

    NOT_INCLUDED --> NEW_PROJECT["New Project / Retainer"]

    style INCLUDED fill:#e8f5e9
    style NOT_INCLUDED fill:#fff3e0
```

Handover Communication Templates

Pre-Handover Email

```
Subject: Handover Call Scheduled - [Project Name]

Hi [Client],

Your workflow is ready for handover! Here's what to expect:

Call: [Date/Time]
Duration: 30-45 minutes

AGENDA:
1. Project overview & deliverables review
2. Live demo of the workflow
3. Monitoring & logging walkthrough
4. Maintenance & support discussion
5. Q&A

BEFORE THE CALL:
- Have access to your n8n instance
- Be ready to test after we go live

See you soon!
```

Post-Handover Email

```
Subject: Handover Complete - [Project Name] Documentation

Hi [Client],

Great call! Here's everything you need:

VIDEOS:
- Workflow Walkthrough: [link]
- Credential Setup: [link]

 DOCUMENTATION:
- Project Overview: [link]
- Technical Docs: [link]
- FAQ: [link]

BACKUPS:
- Workflow Export: [link]

NEXT STEPS:
1. Review the documentation
2. Let me know if you have questions
3. I'll monitor for the next [X] days

The workflow is now live and running!
```

Next: See `06-maintenance-cycle.md` for ongoing support details.

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