



# HANDOVER & DELIVERY GUIDE

---

Workflow Automation Delivery Framework

**ENTERPRISE EDITION**

**Version:** 2.0

**Date:** December 28, 2025

**Author:** Mirza Iqbal

**Contact:** [mirza.iqbal@next8n.com](mailto:mirza.iqbal@next8n.com)

# Table of Contents

---

Table of Contents

Handover & Delivery Guide

Professional Workflow Delivery Process

---

Handover Philosophy

---

Pre-Handover Preparation

Workflow Finalization

---

Environment Preparation

---

Backup Creation

---

---

Documentation Package

Video Documentation

---

Written Documentation

---

---

Handover Call

Scheduling

---

Call Execution

---

During the Call

---

---

Post-Handover

Immediate Follow-Up (Same Day)

---

---

Support Period

---

---

Client Acceptance

Getting Sign-Off

---

---

Final Invoice

---

---

After Project Close

Testimonial Request

---

---

Case Study Creation

---

---

Lessons Learned

---

---

Handover Deliverables Summary

---

---

# Handover & Delivery Guide

---

## Professional Workflow Delivery Process

---

## Handover Philosophy

---

A great handover means the client can operate independently after you leave.

Document like you're never coming back.

---

## Pre-Handover Preparation

---

### Workflow Finalization

#### Clean Up:

- Remove all test data
- Remove all test credentials
- Delete test nodes/comments
- Clear placeholder values
- Remove debugging code

#### Polish:

All nodes clearly named  
Format: [Action] [Target]  
Examples:  
- "Get Customer from HubSpot"  
- "Send Welcome Email"  
- "Update CRM Record"

Sticky notes explain logic  
- What this section does  
- Why certain choices were made  
- Any important notes

Workflow description filled in  
- Brief summary of purpose  
- Trigger explanation  
- Main outcomes

Color coding (optional)  
- Blue: Input/triggers  
- Green: Processing  
- Yellow: AI  
- Orange: Output/actions  
- Red: Error handling

## Environment Preparation

TEST   PRODUCTION TRANSITION:

1. Create duplicate workflow
  - Original: Keep as backup/test
  - Copy: Production version
2. Update production workflow
  - Remove test webhooks
  - Point to production endpoints
  - Use production credentials
3. Disable test workflow
  - Prevent accidental runs
  - Keep for troubleshooting
4. Verify production setup
  - All credentials correct
  - All endpoints correct
  - Triggers configured

## Backup Creation

### BACKUP PROCEDURE:

1. Export production workflow
  - Workflows [Workflow] Download
  - Save as: [project]\_v1.0\_YYYY-MM-DD.json
2. Export subworkflows (if any)
  - Same naming convention
3. Store in multiple locations:
  - Client's Google Drive
  - Your project archive
  - GitHub (if using)
4. Document backup location
  - In handover documentation

---

## Documentation Package

---

### Video Documentation

**Main Walkthrough (5-10 minutes)**

## SCRIPT OUTLINE:

1. INTRO (30 sec)  
"Hi [Name], this is the walkthrough for your [workflow name]. Let me show you how it works."
2. OVERVIEW (1 min)
  - What the workflow does
  - When it triggers
  - What the output is
3. WALKTHROUGH (3-5 min)
  - Show the workflow in n8n
  - Walk through each section
  - Explain the logic
  - Show a test execution
4. MONITORING (2 min)
  - How to check executions
  - Where to see errors
  - Logging sheet (if applicable)
5. MAINTENANCE (1 min)
  - What might need updating
  - How to pause if needed
  - When to contact for help
6. CLOSE (30 sec)  
"That's the overview! Let me know if you have any questions."

## TIPS:

- Use Loom (free, easy)
- Speak slowly and clearly
- Pause at key points
- Zoom in on important parts
- Keep it concise

**Credential Setup Guide (2-3 minutes)**

For each credential type:

- How to access the service
- Where to find API settings
- How to generate new key
- Where to paste in n8n
- How to verify it works

## Written Documentation

### Project Overview Document:

```
# [Project Name] - Overview

## What This Workflow Does
[2-3 paragraph summary]

## How It Works

### Trigger
[When/how the workflow starts]

### Process
1. [Step 1 description]
2. [Step 2 description]
3. [Step 3 description]

### Output
[What happens at the end]

## Integrations Used
| Service | Purpose | Credential Name |
|-----|-----|-----|
| OpenAI | AI processing | OpenAI - Production |
| HubSpot | CRM updates | HubSpot - Production |

## Success Metrics
- [How to know it's working]
- [Expected outcomes]

## Monitoring
- Check executions: [how]
- View logs: [where]
- Error notifications: [how configured]

## Getting Help
- Documentation: [links]
- Contact: [your info]
```

### Technical Documentation:

```
# [Project Name] - Technical Documentation
```

```
## Architecture
```

```
### Data Flow
```

[Trigger] [Processing] [AI] [Output]

### ### Workflow Structure

#### #### Section 1: [Name]

- Purpose: [what it does]
- Nodes: [list of nodes]
- Notes: [important details]

#### #### Section 2: [Name]

[Same structure]

### ## Credentials

Name	Service	Type	Scopes/Permissions
OpenAI	Production	OpenAI	API Key
Google	Production	Google	OAuth

### ## Error Handling

#### ### Error Types Handled

- API timeout [what happens]
- Invalid input [what happens]
- Rate limit [what happens]

#### ### Error Notifications

- Method: [Slack/email/etc.]
- Recipients: [who gets notified]

### ## Maintenance

#### ### Regular Tasks

- [ ] Check execution logs (weekly)
- [ ] Verify costs in dashboard (monthly)
- [ ] Rotate credentials (quarterly)

#### ### Updates

- If n8n updates: Test in backup workflow first
- If API changes: Update affected nodes

### ## Troubleshooting

#### ### Common Issues

**\*\*Issue: Workflow not triggering\*\***

Solution: Check [specific things]

**\*\*Issue: AI response quality dropped\*\***

Solution: Review prompts, check model version

**\*\*Issue: Integration failing\*\***

Solution: Verify credentials, check API status

**FAQ Document:**

## # [Project Name] - FAQ

### ## General

**\*\*Q: How do I know the workflow is running?\*\***

A: Check the execution history in n8n or view the logging sheet at [link].

**\*\*Q: How can I pause the workflow?\*\***

A: Toggle the workflow to "Inactive" in n8n.  
No new executions will run.

**\*\*Q: What if something goes wrong?\*\***

A: You'll receive a notification at [email/Slack].  
Check the error log for details.

### ## Troubleshooting

**\*\*Q: The workflow failed. What do I do?\*\***

A: 1. Check the execution in n8n for error details  
2. Look at the logging sheet  
3. Common fixes: [list]  
4. If stuck, contact [you]

**\*\*Q: The AI output seems wrong.\*\***

A: AI outputs can vary. If consistently wrong:  
1. Check the input data quality  
2. Review recent executions  
3. Contact for prompt adjustment

### ## Changes & Updates

**\*\*Q: Can I modify the workflow myself?\*\***

A: For small changes, yes. For significant changes, recommend discussing first to avoid issues.

**\*\*Q: How do I add new functionality?\*\***

A: New features would be scoped as a separate project.  
Contact to discuss requirements.

### ## Support

**\*\*Q: How do I get help?\*\***

A: - Check this FAQ first  
- Review the documentation  
- Contact: [your info]  
- Retainer clients: [special access]

# Handover Call

---

## Scheduling

HANDOVER CALL INVITATION:

Subject: Handover Call - [Project Name]

Hi [Name],

Your workflow is ready for handover!

Date: [Date]

Time: [Time]

Duration: 45-60 minutes

Link: [Zoom/Meet link]

AGENDA:

1. Scope review & deliverables confirmation
2. Live demo of the workflow
3. Monitoring & logging walkthrough
4. Maintenance discussion
5. Credential swap & go-live
6. Q&A

PLEASE PREPARE:

- Access to your n8n instance
- Production credentials ready
- Questions you want answered

Looking forward to it!

## Call Execution

**Detailed Agenda:**

## HANDOVER CALL RUNDOWN (60 min)

### 0:00 - INTRO (5 min)

- Confirm agenda
- Confirm recording (if allowed)
- Set expectations

### 0:05 - SCOPE REVIEW (10 min)

- Review original scope
- Confirm each deliverable
- Highlight any changes
- Get verbal confirmation

### 0:15 - LIVE DEMO (15 min)

- Show workflow overview
- Trigger test execution
- Walk through each step
- Show final output
- Demonstrate error handling

### 0:30 - MONITORING (10 min)

- Show execution history
- Explain how to check status
- Demo the logging sheet
- Show error notifications
- Explain what to look for

### 0:40 - MAINTENANCE (5 min)

- What might need updating
- How to pause workflow
- Backup/restore process
- When to contact you

### 0:45 - GO-LIVE (10 min)

- Swap test production creds
- Enable production workflow
- Run first live execution
- Verify everything works
- Celebrate!

### 0:55 - Q&A (5 min)

- Answer remaining questions
- Confirm next steps
- Discuss support/retainer

### 1:00 - CLOSE

- Thank them
- Confirm documentation coming
- Set post-launch check-in

## During the Call

### Your Checklist:

Screen sharing works  
n8n open and ready  
Demo data prepared  
Documentation links ready  
Recording (if permitted)  
Notes document open

### Questions to Confirm:

"Does this match what you expected?"  
"Any questions about how this works?"  
"Is the output format correct?"  
"Anything you'd like adjusted?"  
"Ready to go live?"

---

# Post-Handover

---

## Immediate Follow-Up (Same Day)

SUBJECT: Handover Complete - [Project Name]

Hi [Name],

Thank you for the handover call! Your workflow is now live.

CALL RECORDING:

[Link - if recorded]

DOCUMENTATION VIDEOS:

- Main Walkthrough: [link]
- Credential Guide: [link]

WRITTEN DOCS:

- Project Overview: [link]
- Technical Documentation: [link]
- FAQ: [link]

BACKUPS:

- Workflow Export: [link]

WHAT'S NEXT:

1. I'll monitor the workflow for the next [X] days
2. You'll receive notifications if any issues arise
3. Let me know if you have questions

Your automation is running! If you notice anything unexpected, reach out and I'll take a look.

Best,  
[Your Name]

## Support Period

### Post-Launch Monitoring:

DAILY (First 3 days):

- Check execution history
- Review error logs
- Verify outputs look correct
- Respond to any client questions

WEEKLY (First 2 weeks):

- Summary check of all executions
- Review any issues
- Client check-in (brief)

END OF SUPPORT PERIOD:

- Final review
- Close out any issues
- Transition to maintenance or close

### Bug Fix Protocol:

IF ISSUE REPORTED:

1. ACKNOWLEDGE (within X hours)  
"Got it, looking into this now."
2. DIAGNOSE
  - Check execution logs
  - Reproduce if possible
  - Identify root cause
3. COMMUNICATE  
"Found the issue: [brief explanation]  
Fixing now, will update shortly."
4. FIX
  - Test fix in backup workflow
  - Apply to production
  - Verify fix works
5. CONFIRM  
"Fixed! Here's what happened and what I did.  
Please verify on your end."

# Client Acceptance

---

## Getting Sign-Off

SUBJECT: Project Acceptance - [Project Name]

Hi [Name],

Now that the workflow is live and you've had a chance to verify everything, I'd like to formally close out the project.

PLEASE CONFIRM:

All deliverables received  
Workflow functioning correctly  
Documentation complete  
Any outstanding questions answered

If everything looks good, please reply with "Approved" and I'll send the final invoice.

If there are any issues, let me know and we'll address them before closing.

Thank you for working with me on this!

## Final Invoice

INVOICE TIMING:

Send final invoice after:  
Client confirms acceptance  
Support period complete  
All issues resolved

INCLUDE:

- Reference to project
- Itemized breakdown (if applicable)
- Payment terms
- Payment methods
- Thank you note

## After Project Close

---

### Testimonial Request

SUBJECT: Quick Request - Testimonial

Hi [Name],

I hope the workflow is serving you well!

I'm building my portfolio and would love to include our project. Would you be willing to share a brief testimonial about working together?

A few sentences about:

- The problem we solved
- How the solution is helping
- What the experience was like

If you're comfortable, I could also:

- Feature you as a case study
- List you as a reference

Totally understand if not. Either way, it was great working with you!

[Your Name]

## Case Study Creation

### CASE STUDY TEMPLATE:

```
# [Project Name] - Case Study

## Client
[Company Name, Industry]

## Challenge
[What problem they had]

## Solution
[What you built]

## Results
[Quantifiable outcomes if possible]

## Testimonial
"[Client quote]"
- [Client Name, Title]

## Tech Stack
- n8n
- [Integrations]
- [AI models]
```

## Lessons Learned

### PROJECT DEBRIEF:

What went well:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What could improve:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Process updates needed:

1. \_\_\_\_\_

Templates to update:

1. \_\_\_\_\_

For next similar project:

1. \_\_\_\_\_

---

## Handover Deliverables Summary

---

### COMPLETE HANDOVER PACKAGE:

Production workflow (live in n8n)  
Backup workflow (testing version)  
Workflow JSON exports  
Main walkthrough video (Loom)  
Credential setup video (Loom)  
Project overview document  
Technical documentation  
FAQ document  
Credential inventory  
Handover call completed  
Call recording (if applicable)  
Client acceptance received

**Next:** See `06-maintenance-retainer.md` for ongoing support.

---

Workflow Automation Delivery Framework | next8n | <https://next8n.com>

This document is confidential and intended for authorized use only.