



HANDOVER CHECKLIST

Workflow Automation Delivery Framework

ENTERPRISE EDITION

Version: 2.0

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Table of Contents

Table of Contents	
Handover Checklist	
Professional Workflow Delivery Guide	
Pre-Handover Preparation	
Workflow Finalization	
Workflow Hygiene Audit	
Backup Creation	
Documentation Preparation	
Video Documentation	
Written Documentation	
Visual Assets	
Handover Call Preparation	
Scheduling	
Call Agenda	

Your Checklist During Call

Handover Call Execution

During the Call

Notes to Capture

Post-Handover Delivery

Immediate (Same Day)

Email Template

Post-Launch Monitoring

First 24 Hours

First Week

Support Period End

Client Acceptance

Formal Acceptance

Acceptance Criteria Verification

Project Close

Financial

Relationship

Archive

Handover Deliverables Checklist Summary

Handover Checklist

Professional Workflow Delivery Guide

Pre-Handover Preparation

Workflow Finalization

- Production workflow created (separate from test)
- Test data removed from workflow
- Test credentials removed/replaced
- Workflow enabled in production mode
- All node names are clear and descriptive
- Sticky notes added explaining key logic
- Workflow description filled in
- Color coding applied (if used)

Workflow Hygiene Audit

- No hardcoded secrets anywhere
- No test URLs or endpoints
- No commented-out test code
- No placeholder values
- All nodes connected properly
- No orphan nodes
- Error workflow configured
- Execution settings optimized

Backup Creation

Production workflow exported as JSON

Filename: _____

Location: _____

Test/development version archived

Subworkflows exported (if any)

Backup stored in:

Google Drive

GitHub

Client's storage

Other: _____

Version documented

Version: _____

Date: _____

Documentation Preparation

Video Documentation

Main Walkthrough Video

Duration target: 5-10 minutes

Script/outline prepared

Screen recording ready

Recording completed

Uploaded to: _____

Link: _____

Credential Setup Video (if needed)

Duration target: 2-3 minutes

Step-by-step API key creation

Where to paste in n8n

Testing verification

Link: _____

Troubleshooting Video (optional)

Common issues covered

How to check logs

When to contact support

Link: _____

Written Documentation

Project Overview Document

Contents:

- Project summary
- What the workflow does
- Trigger description
- Main logic explained
- Outputs/actions described
- Key integrations listed
- Success metrics

Location: _____

Technical Documentation

Contents:

- Architecture diagram
- Data flow explanation
- Credential list (names only)
- Integration details
- Error handling logic
- Logging details

Location: _____

FAQ Document

Contents:

- Common questions
- Troubleshooting steps
- Contact information
- What to do if X happens

Location: _____

Credential Inventory

Format: Name | Service | Owner | Last Rotated

Location: _____

Visual Assets

Workflow screenshot/PDF

- Full workflow view
- Annotations if helpful

Location: _____

Architecture diagram (if complex)

Data flow diagram (if complex)

Handover Call Preparation

Scheduling

Call scheduled

Date: _____

Time: _____

Duration: 30-60 minutes

Platform: _____

Calendar invite sent with:

Agenda

What client should prepare

Recording permission note

Call Agenda

Agenda prepared:

1. OVERVIEW (5-10 min)
 - Review project scope
 - Confirm deliverables
 - High-level architecture
2. LIVE DEMO (10-15 min)
 - Show workflow in n8n
 - Trigger a test execution
 - Walk through each step
 - Show final output
3. MONITORING (5-10 min)
 - Show execution history
 - Explain error logs
 - Demo logging sheet
 - Error notification setup
4. MAINTENANCE (5-10 min)
 - What might need updating
 - How to disable if needed
 - Backup/restore process
 - Support options
5. CREDENTIAL SWAP (5 min)
 - Remove test credentials
 - Add production credentials
 - Verify connections work
6. GO LIVE (5 min)
 - Enable workflow
 - Verify first execution
 - Confirm working
7. Q&A (10 min)
 - Answer questions
 - Clarify anything unclear
 - Confirm next steps

Your Checklist During Call

- Environment ready (no clutter on screen)
- Demo data prepared
- Documentation links ready to share
- Screen share tested
- Recording ready (if permitted)
- Notes document open

Handover Call Execution

During the Call

- Recording started (if permitted)
- Introductions done
- Agenda shared
- Scope reviewed
- Live demo completed
- Monitoring explained
- Maintenance discussed
- Credentials swapped
- Workflow enabled
- First execution verified
- Questions answered
- Next steps confirmed

Notes to Capture

Questions asked:

1. _____
2. _____
3. _____

Issues identified:

1. _____
2. _____

Follow-up items:

1. _____
2. _____

Client feedback:

Post-Handover Delivery

Immediate (Same Day)

Thank you email sent
Call recording shared (if recorded)
Documentation links sent:
 Walkthrough video
 Project overview
 Technical docs
 FAQ
 Workflow export/backup

Follow-up items addressed (if any)

Email Template

Subject: Handover Complete - [Project Name]

Hi [Client Name],

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

RECORDINGS & VIDEOS:

- Handover Recording: [link]
- Walkthrough Video: [link]

DOCUMENTATION:

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

BACKUPS:

- Workflow Export: [link]

NEXT STEPS:

1. I'll monitor the workflow for the next [X] days
2. Let me know if you have any questions
3. [Any specific next steps]

The workflow is active and processing live data!

Best regards,
[Your Name]

Post-Launch Monitoring

First 24 Hours

First executions verified
No errors observed
Outputs match expectations
Client confirmed working

First Week

Daily execution check
Error rate monitored
Client questions answered
Bug fixes applied (if any)
Logging reviewed

Support Period End

Support period duration: ____ days
All issues resolved
Client satisfied
Transition to maintenance or close

Client Acceptance

Formal Acceptance

All deliverables verified against scope
Client confirms acceptance
Method: Email Form Signature
Date: _____

Acceptance documented

Acceptance Criteria Verification

Deliverable 1: _____

Delivered Verified Accepted

Deliverable 2: _____

Delivered Verified Accepted

Deliverable 3: _____

Delivered Verified Accepted

Success Criterion 1: _____

Met

Success Criterion 2: _____

Met

Success Criterion 3: _____

Met

Project Close

Financial

Final invoice sent

Amount: \$_____

Date sent: _____

Payment received

Date: _____

Method: _____

Relationship

Testimonial requested

Requested

Received

Link: _____

Case study discussed

Client agreed

Draft created

Published

Referral opportunity discussed

Retainer opportunity discussed

Archive

All project files organized

Backups stored securely

Documentation archived

Lessons learned noted:

What went well:

What could improve:

Project closed in PM tool

Handover Deliverables Checklist Summary

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HANDOVER DELIVERABLES	
=====	
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Next: See 06-offboarding-checklist.md for project close & exit.