



# HANOVER CHECKLIST

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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# Handover Checklist

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## Professional Workflow Delivery Guide

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### Pre-Handover Preparation

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#### 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

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## 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

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## 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:

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## Post-Handover Delivery

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### 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

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## Client Acceptance

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### 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

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## Project Close

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### 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:

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What could improve:

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Project closed in PM tool

# Handover Deliverables Checklist Summary

HANDOVER DELIVERABLES	
Production workflow (live in n8n)	
Workflow JSON export (backup)	
Main walkthrough video (Loom)	
Credential setup guide (Loom)	
Project overview document	
Technical documentation	
FAQ document	
Credential inventory	
Handover call completed	
Recording shared (if applicable)	

**Next:** See [06-offboarding-checklist.md](#) for project close & exit.

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