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Project Handover Checklist Template

What is Project Handover Checklist Template?

A project handover checklist template is a document that outlines the necessary steps and tasks required for transferring ownership, responsibility, and knowledge from one team or individual to another during a project's transition phase. The purpose of this template is to ensure a seamless transfer of information, minimize disruptions, and maintain continuity throughout the project lifecycle.

Here's a general outline of what you might include in a project handover checklist template:

Project Overview

1. Project scope: Brief summary of the project goals, objectives, and deliverables.
2. Timeline: Key milestones, deadlines, and timelines for completion.
3. Stakeholders: List of key stakeholders, their roles, and contact information.

Knowledge Transfer

1. Project documentation: Review and handover relevant documents, such as:
    - Project plans
    - Meeting minutes
    - Reports
    - Specifications
2. Task assignments: Identify and document specific tasks, responsibilities, and ownership for each team member.
3. Communication channels: Establish clear communication protocols for ongoing project discussions and updates.

Handover Tasks

1. Review progress: Verify the project's current status, including completed tasks, remaining work, and any outstanding issues.
2. Training and orientation: Provide training or orientation for new team members to ensure they understand their responsibilities and can continue the project without interruptions.
3. Transfer of knowledge: Document key decisions, assumptions, and expertise held by current team members, ensuring that this information is preserved and transferred to new team members.

Project Management Tools

1. Project management software: Update access levels, passwords, or other permissions as needed for new team members.
2. Version control systems: Ensure all necessary files are up-to-date and accessible to new team members.
3. Communication tools: Review and update communication channels, such as email groups, chat rooms, or collaboration platforms.

Ongoing Support

1. Ongoing monitoring: Establish a process for ongoing project monitoring and reporting to ensure the new team is aware of any changes or issues that may arise.
2. Issue resolution: Document procedures for addressing and resolving any issues or conflicts that may arise during the handover process.
3. Feedback mechanism: Establish a system for receiving feedback from new team members, allowing for adjustments and improvements in the project's ongoing management.

Closure

1. Formal acceptance: Obtain formal acceptance of the completed project tasks or phases from stakeholders.
2. Project closure: Document all necessary closure procedures, such as updating project status, archiving files, and notifying relevant parties.

Remember to customize your project handover checklist template according to your organization's specific needs and project requirements. This will help ensure a smooth transition and minimize potential disruptions during the project lifecycle.

project, management, knowledge, transfer, tools, support, closure

Project Handover Checklist

Handover Details

- **Project Name:**
- **Current Project Manager:**
- **New Project Manager:**
- **Handover Date:**

Tasks and Responsibilities

- [ ] Review project scope and deliverables
- [ ] Go over project schedule and deadlines
- [ ] Discuss key project milestones and status
- [ ] Transfer essential project documentation
- [ ] Share access to project management tools and files
- [ ] Introduce new project manager to the team and stakeholders

Documentation

- [ ] Handover of project plan and related strategies
- [ ] Transfer of project reports and analysis documents
- [ ] Sharing of risk management plans and mitigation strategies
- [ ] Provision of contracts, agreements, and vendor details

- [ ] Delivery of technical documentation and user manuals

Financials

- [ ] Overview of project budget and financial reports
- [ ] Update on current expenditures and remaining budget
- [ ] Discussion of financial controls and processes

Communication

- [ ] Introduction to key stakeholders and contact list
- [ ] Briefing on ongoing communications and upcoming meetings
- [ ] Clarification of communication protocols and escalation paths

Access and Permissions

- [ ] Transfer of login credentials and access rights
- [ ] Update on the status of licenses and subscriptions
- [ ] Handover of administrative controls for project tools

Training and Support

- [ ] Schedule for training on project-specific tools and processes
- [ ] Plan for ongoing support during the transition period

Sign-off

- **Handed over by:**
- **Received by:**
- **Date:**
- **Signatures:**

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