IT Handover Checklist

A comprehensive IT handover checklist is essential for ensuring a smooth transition between solution providers.

Here's a checklist that you can use to guide the process:

1. Documentation Handover

- ☐ Detailed network diagrams and data flow charts.
- ☐ Server and application architecture documentation.
- ☐ System and application configuration details.
- ☐ User manuals and system operation guides.
- ☐ Current project status reports and roadmaps.
- ☐ Licensing information and software keys.
- ☐ Compliance and regulatory documentation.

2. Knowledge Transfer

- ☐ Schedule knowledge transfer sessions.
- ☐ Provide training on specific systems and tools.
- ☐ Offer insights into known issues and troubleshooting steps.
- ☐ Review critical processes and procedures.

3. Access Credentials

- ☐ List of all administrative passwords.
- ☐ Access details for hosting environments.
- ☐ Secure transfer of multi-factor authentication systems.

4. Asset Transfer

- ☐ Inventory of all hardware and software assets.
- ☐ Physical transfer of equipment, if necessary.
- ☐ Legal transfer of software licenses.

5. Data Handover

- ☐ Complete backup of all data.
- ☐ Secure transfer of data to the new provider.
- ☐ Data integrity checks post-transfer.

6. Third-Party Vendor Details

- ☐ Contact information for third-party service providers.
- ☐ Details of ongoing negotiations or service level agreements (SLAs).
- ☐ Transfer of third-party support contracts.

7. Support Transition
- ☐ - Information about current open support tickets.
- ☐ - Escalation procedures and contact points for critical incidents.
- ☐ - Handover of support tools and monitoring systems.

8. Legal and Compliance
- ☐ Confirmation of data privacy requirements.
- ☐ Review and transfer of any compliance certifications.
- ☐ Update contractual documents to reflect the change in providers.

9. Project Handover
- ☐ Status of ongoing projects and development work.
- ☐ Access to source code repositories and build systems.
- ☐ Transfer of project management tools and current sprint details.

10. Financial Information
- ☐ Final billing and payment arrangements with the outgoing provider.
- ☐ Details of recurring costs for budgeting by the new provider.

11. Operational Handover
- ☐ Schedules for batch jobs and maintenance windows.
- ☐ Logs and reporting systems handover.
- ☐ Review of disaster recovery plans and recent test results.

12. Communication Plan
- ☐ Internal communication to stakeholders about the transition.
- ☐ Update contact lists with new support and project contacts.
- ☐ Public announcement strategy, if applicable.

Each item should be checked off only when all relevant information, access, or training has been successfully transferred and acknowledged by the incoming solutions provider. It's also crucial to have a handover period where the outgoing provider is available to assist with any teething problems.