

The website handover checklist.

Eight things to hand over, so whoever comes next can run the site without ringing anyone. Tick each one off before the final invoice is paid.

The steps differ by platform. There is a version of this for WordPress, Squarespace, Wix and Shopify at adamroe.co.uk/blog.

ACCOUNTS AND OWNERSHIP

- ☐ **The code is in version control, in the business's organisation**
Not a Zip file, and not one person's personal account. The history of every change is part of what is being handed over.
- ☐ **The branch that deploys to production is named in writing**
With whatever protects it and how a change gets merged. "There is no process, be careful" is a complete answer if it is written down.
- ☐ **Every credential is in a shared vault the business owns**
Hosting, DNS, CMS, database, CDN, transactional email, analytics and every third-party API. Not an email thread or a spreadsheet.
- ☐ **The domain registrar account is in the business's name**
Whoever holds it controls the website and the email. Check who the account holder is, not just who has the password.
- ☐ **The hosting account is in the business's name, with its own card**
A card that expires on a developer's account can take the site and the email down with it.

RUNNING IT AND DEPLOYING IT

- ☐ **Steps someone can follow cold, on a machine that has never seen the project**
Clone, install, environment variables, run, test, deploy. The actual commands, not a description of them.
- ☐ **Every environment variable is listed, with where the real value lives**
Each one is a service the site depends on. Together they are often a better map than any architecture document.
- ☐ **What triggers a deploy, how to roll back, and how long a rollback takes**
The two things somebody needs at 6pm on a Friday, when the person who knows is not answering.
- ☐ **Someone who was not on the project has followed the steps**
Every place they stop is a line to add. How long it takes them is the real measure of the handover.

DOMAIN, DNS AND EMAIL

- ☐ **Where the nameservers point, and what every record is for**
Not just the A and CNAME records for the site.

☐ **Email records are written down: MX, SPF, DKIM and DMARC**
The records most often lost in a tidy-up, and the ones that stop email arriving when they go.

☐ **Verification TXT records are labelled with the service that needs them**
An unlabelled TXT record gets deleted by the next person doing housekeeping, and something breaks silently.

☐ **Anything with a TTL that matters, or that changes at the next migration**
So the next move can be planned rather than discovered.

REDIRECTS

☐ **The redirect map as shipped, not as planned**
This is the artefact that decides whether the search traffic survived the move.

☐ **The number of rules, and the date they were last checked**
A map nobody has tested since launch is a list of guesses.

☐ **Chains checked: no redirect pointing at another redirect**
Common on a site that has moved twice, and only untangled by someone holding both maps.

SEARCH AND ANALYTICS

☐ **Analytics ownership transferred to the business's own account**
Transferred, not shared from the agency's login. Access granted can be taken away, and the history goes with it.

☐ **Search Console verified by a DNS record**
A file or a meta tag does not survive the next rebuild. The historic data cannot be recreated later.

☐ **The sitemap is submitted, and it lists what should be indexed**
Worth opening once, at handover, rather than assuming.

WRITTEN DOWN, SO NOBODY HAS TO REMEMBER

☐ **A decisions log: what was chosen, when, and why**
It stops the same work being done twice, and answers "why don't we just..." before it is asked.

☐ **An honest list of what was deliberately left unfinished**
It shows the difference between a gap that was agreed and one that was missed.

☐ **Known risks: what will break, and roughly when**
A licence that expires, a plugin abandoned upstream, a certificate somebody has to renew by hand.

☐ **Who to contact, and what happens after the last invoice**
Support, fixes and questions, agreed in writing rather than assumed on both sides.

Take it, change it, use it in your own projects. No need to credit me. adamroe.co.uk/blog/website-handover-checklist