Project Closure and Handover Workflow (Consultants)

Overview

This document outlines the essential steps consultants should follow to ensure smooth project closure and effective handover to clients or internal teams.

Workflow Steps

1. **Review Project Deliverables**
   Verify all contracted deliverables are completed, documented, and meet quality standards.
2. **Internal Quality Check**
   Conduct final internal reviews to ensure completeness and accuracy.
3. **Prepare Handover Documentation**
   Assemble all relevant documents: user manuals, technical files, code repositories, drawings, licenses, etc.
4. **Client Meeting / Presentation**
   Present final deliverables to the client, demonstrate outcomes, and clarify any outstanding issues.
5. **Obtain Client Approval**
   Secure client sign-off on all deliverables and receive formal acceptance of the project closure.
6. **Transfer Project Assets**
   Transfer all agreed project documents, source files, credentials, and other assets to the client.
7. **Knowledge Transfer & Training**
   Provide necessary training and address follow-up questions to ensure client is equipped for ongoing operations.
8. **Collect Feedback & Lessons Learned**
   Solicit feedback from client and project team. Document best practices and lessons for future projects.
9. **Archive Project**
   Archive project files according to company policy for future reference and compliance.
10. **Close Project and Release Resources**
    Complete final paperwork, reallocate team members, and close out all administration tasks.

Key Handover Documents

- Final Deliverables Summary
- Operation/User Manuals
- Technical Documentation
- Project Files and Source Code
- Configuration/Setup Guides
- Licenses and Credentials
- Support Contacts/Escalation Paths

Sign-Off

Consultant: ______________________________
Date: _____ / _____ / _______

Client/Representative: ______________________________
Date: _____ / _____ / _______