

The Handoff Package Checklist

Infrastructure That Survives Your Departure — Chapter 12 Play

DIGITAL DOWNLOAD — EXCLUSIVE COMPANION RESOURCE

Start building this the day your first pipeline reaches production. Update with every deployment. By the time you leave—whether by choice, by contract end, or by reorg—the Handoff Package should be complete enough that a competent successor can maintain and extend what you've built.

1. SYSTEM DOCUMENTATION

- Architecture diagram (data flows, dependencies, integrations)
- Access credentials stored securely (vault, not sticky notes)
- Known issues and workarounds documented
- Environment setup instructions (dev, staging, production)
- Written for a competent person who is NOT you

2. USER GUIDE

- Step-by-step walkthroughs with screenshots
- Common error messages and their solutions
- FAQ based on actual questions from office hours
- Written for the least technical person who will use the system

3. MAINTENANCE PLAYBOOK

- Daily / weekly / monthly maintenance tasks listed

Most common failure modes and fixes documented

Monitoring dashboards explained (what alerts mean)

Escalation contacts for issues beyond routine maintenance

4. TRAINING MATERIALS

Office hours materials refined and documented

First-prompt walkthrough for new users

“What it can and can’t do” one-pager

Role-specific use case examples

5. GOVERNANCE KIT

Approved tools list with rationale

Safe data categories clearly defined

Red lines explicitly stated

Human review process with named reviewers

Packaged as standalone document (see Governance Mini-Kit)

COMPLETION STATUS

Track overall readiness: **Not Started** **In Progress** **Draft Complete**

Reviewed by Successor **Handoff Complete**