

PROJECT TAKEOVER CHECKLIST

Four phases for taking over a system from a previous service provider.

Practical guide for seamless handovers without business interruption.
Developed from two system takeovers in 2023 and 2024, one of which was in the public sector.

STRUCTURE	SCOPE	BUILDING BLOCK	STATUS
Four phases	Approximately 30 checkpoints	5 of 6	1/2026

Taking over an existing system from a previous service provider is one of the most challenging moments in a long-term software project. The stakes are high because a mistake during the handover can have repercussions for years. Visibility is low because external observers don't see the actual work involved.

This checklist divides the takeover process into four phases with clear checkpoints. Essentially, it serves as a user manual for procurement managers overseeing a supplier change. It can be used simultaneously by both the outgoing and incoming suppliers.

01 Prior to the acquisition (due diligence)

TIMEFRAME: 4 TO 6 WEEKS BEFORE HANDOVER

- ☐ Check the completeness of the handover documentation (architecture, operating manual, data model, interfaces)

Missing documentation is the most frequent issue. Early inclusion in the handover protocol creates binding obligations.

- ☐ Identify repository status and access methods (Git history, branches, tags, completeness)

An incomplete repository that is only delivered and not historically preserved blocks long-term maintenance.

- ☐ Review ticket history and submit change request backlog

Open tickets from the predecessor's era reveal the true system weaknesses.

- ☐ Identify contractual relationships with suppliers and third-party components

Forgotten supplier contracts are a typical cost trap in the first year of operation.

- ☐ Check licenses and usage rights (open source, commercial, contract rights)

Libraries used by the predecessor under proprietary licenses must be handed over in a documented manner.

- ☐ Inventory technical debt and prioritize it with the client.

Honestly recording technical debt prevents surprises in the third year of operation.

02 Handover period

TIMEFRAME: 4 TO 8 WEEKS IN PARALLEL

- ☐ Define parallel operation (responsibilities, reporting channels, release paths)
Who decides on change requests during the transition phase? Document a clear, written agreement.

- ☐ Conduct knowledge transfer sessions with key personnel from the predecessor.
Recording sessions with mutual consent reduces later follow-up questions.

- ☐ Establish communication channels and name contact persons
The client must know at all times whom he is addressing.

- ☐ Set up test environments and compare them with the production environment.
Discrepancies between testing and production are standard errors during system takeovers.

- ☐ Implement your first own change requests to understand the system from a user's perspective.
A simulated small change request during the handover phase reveals process gaps.

03 takeover

TIMEFRAME: DEADLINE FOR ASSUMING RESPONSIBILITY

- ☐ All access data is being rotated (databases, systems, external services).
The predecessor must no longer have operational access after the cut-off date.
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 - ☐ Take over deployment pipelines and migrate them to your own infrastructure
The predecessor's pipelines are often tied to its CI/CD landscape. Early migration reduces the risk of failure.
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 - ☐ Test and document backup and restore procedures
A restore test in the first week after the takeover immediately shows whether the transferred backups are usable.
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 - ☐ Switch monitoring and alerting to your own systems
Blackouts often occur because alerts are still being routed to the predecessor.
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 - ☐ Update operating manuals and final release of communication channels
The client and other parties involved must receive the new contact details in writing.
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04 After the takeover

TIMEFRAME: FIRST 30, 90 AND 180 DAYS

- ☐ First 30 days: close monitoring, daily status check
System stability is not yet guaranteed. Errors from the handover phase are now coming to light.
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 - ☐ First 90 days: implement your first own change requests and validate response times
During this phase, the client checks whether the promised service times are realistic.
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 - ☐ First 180 days: Retrospective together with the client
A documented retrospective after six months is the best anchor of trust for the coming contract years.
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 - ☐ Resolve remaining open issues from the takeover
Issues that were postponed to "later" during the handover phase risk remaining permanently unresolved.
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The checklist is based on two system takeovers.

In 2023, we successfully completed the takeover of the STAR system from a predecessor service provider on behalf of GFAW Thüringen without any operational interruption. In 2024, we acquired .NET applications for a national defense agency as part of a WTO-approved tender process. Both takeovers resulted in the audit points listed here. Please contact us if you have any questions regarding the application of this checklist.

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