Design Alive:
Checklist for handing over a website

→ You might like to make a copy of this doc so you can check off the items to ensure you've gotten them all!

This doc is written as though you were using it for a project with a client. Some of the steps and language will be irrelevant, but follow as much as you can, for the practice. Later, when working with clients, you can come back to this checklist and use it!

Behind the scenes:

- [ ] **Set everything to update automatically.** Head to the plugins & themes pages and enable automatic updates.
- [ ] **Set up a backup solution.** If your client is on a hosting company that retains backups, you can skip this. Otherwise, you can suggest they purchase this from their hosting company, or from Jetpack.
- [ ] **Take a manual backup and send to your client for safekeeping:** You are not obligated to do this, but it's a good idea. Most backup services only retain 30 days' worth of backups. You can use a plugin like Updraft Plus to generate & download a backup. You can send your client the zipped files and request that they store it somewhere safe. (You can delete the plugin afterward).
- [ ] **Prep setup for analytics.**
  Either:
  - [ ] Install the Monster Insights plugin. (There are many ways to connect Google Analytics to a website, but this is an easy way that also makes it easy for clients to access the data.)
  - [ ] Install WP Statistics plugin. This will require no further setup.
- [ ] **Record an introduction to the dashboard.** The Nimbus Screen Capture Chrome Extension is a great tool for this. You can download your screen recording and upload it to Youtube, Vimeo, or Google Drive. Walk through:
  - [ ] How to login
  - [ ] Where to find the pages and anything that appears on the front end

- [ ] What the plugins on the site are used for (briefly)

- [ ] How to edit pages. You do not need to go in-depth. Go to the spots they are most likely to edit most often (eg, testimonials, client logos, galleries), and review those areas.

- [ ] If forms are used, and if you have conditional logic or anything complex set up, let them know to be careful before editing them.

- [ ] **Prepare a handoff document:**

1. Username for your client and all login information, including a link to the login page.
2. A link to the video tutorial you prepared
3. A list of a few links to generic WordPress tutorials to assist them. We recommend the following; although you can add any documentation that's relevant to your client.
    a. Working with the block editor
    b. How to add a link
    c. How to work with buttons
    d. How to edit a menu
4. List where backups are stored, and include the name of the hosting company & domain registrar. (Sometimes clients need this information years later and can't remember.)
5. Where to find website statistics.

With your client:

This is best done by phone, with an email summary afterward.

- [ ] Give them the document you prepared.

- [ ] Tell them to unsubscribe from all marketing emails from their hosting company. Once they are no longer receiving junk email, they must pay attention to any emails sent by the hosting company. Sometimes it won't be important, but other times it will be something critical, such as an expired credit card or a server change that requires action. If they ignore these emails, they risk losing their website permanently.

- [ ] ***If you are using Google Analytics:*** Ask them to sign up for a Google Analytics account if they don't have one. (To set up, use these directions, follow steps 1 - 3.) In Monster Insights, there is a button to connect your Google account. Instead of asking your clients for their Google password, you can send them a link to the Monster Insights page and tell them to click the button and follow the directions.

- [ ] Ask for a testimonial!

Once you've finished project handover, it's time to submit your project (listed on Moodle as a quiz.)