CLIENT AND STAKEHOLDER MEETINGS

Client Handover Agenda

[Client name]: [project name]

MEETING DATE [Month day, year] · **LENGTH** 60 minutes

Time	[00:00] to [00:00]	**Location**	[Room or video link]
Client lead	[Name, role]	**Our lead**	[Name]
Attendees	[Names]		

Objective

> *Transfer everything [client] needs to run [deliverable] without us, confirm who supports what from now on, and get sign-off.*

Assume nobody on the client side was in the project. Everything they need has to be in the documents.

Before the meeting

- Send the handover pack (documents, access list, support terms) by [date].
- Client: invite the people who will own each part after today.

Agenda (60 minutes)

No.	Min	Item	Lead	Purpose
1	**15**	**Walk through deliverables** What was delivered, and how to use it.	[Our lead]	Inform
2	**15**	**Transfer access and documentation** Go through the checklist below, item by item.	[Our lead]	Discuss
3	**10**	**Support from now on** What's included, how to ask for help, response times.	[Our lead]	Inform
4	**10**	**Open items** Anything unfinished: owner and date.	[Our lead]	**Decide**
5	**10**	**Sign-off** Client confirms the work is accepted.	[Client lead]	**Decide**

Handover checklist

- ☐ Admin logins transferred and our access removed
- ☐ Source files and documents shared
- ☐ User guide or training delivered
- ☐ Support contact and hours confirmed
- ☐ Warranty or support period stated in writing
- ☐ Final invoice and payment terms agreed

MEETING RECORD

Client Handover Agenda

NOTETAKER [Name]

Deliverables and new owners

Deliverable	Where it lives	Client owner
[Deliverable]	[Link or location]	[Name]
[Deliverable]	[Link or location]	[Name]
[Deliverable]	[Link or location]	[Name]
[Deliverable]	[Link or location]	[Name]

Decisions, actions and parking lot

Type	What was agreed	Owner	Due
Decision	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Parked	[Topic, and where it goes next: meeting, email, next agenda]	[Name]	[Date]

Notes

[Anything else worth keeping: numbers quoted, open questions, who to follow up with]

Sign-off

Signing confirms the deliverables listed in this document are accepted and support now runs on the agreed terms.

Party	Name	Signature	Date
Client	[Name]		[Date]
Our side	[Name]		[Date]