



CHECKLIST

FREE

THE WEBSITE HANDOVER CHECKLIST

Changing developer or agency? Collect everything on this list before the relationship ends.

01

TIMING IS THE WHOLE TRICK

The difference between a clean handover and a hostage situation is usually when you start, not what you ask for. Start this checklist 30 days before the relationship ends, verify everything yourself before the final invoice is paid, and change credentials after the transfer completes. Goodwill is highest before the last payment, use that window.

ACCESS AND ACCOUNTS

- ☐ Hosting account: ownership transferred to you, or credentials handed over and the account moved onto your billing
 - ☐ Domain registrar: the domain sits in an account you own. This one is non-negotiable, everything else can be rebuilt, the domain cannot
 - ☐ DNS management: access to wherever the records actually live, often not the registrar
 - ☐ CMS admin: an administrator account in your name, not a shared login
 - ☐ Code repository: ownership or a complete copy transferred
 - ☐ Server or FTP/SSH access where it applies
 - ☐ CDN or security service (Cloudflare and similar): account ownership or transfer
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CODE, CONTENT AND LICENCES

- ☐ A complete site backup, files and database, dated, stored somewhere you control
 - ☐ Database export in a standard format
 - ☐ The media library, original images and source files
 - ☐ Licences: themes, plugins, fonts, stock imagery, listed with what is licensed to whom. Licences held in the agency's name die with the relationship
 - ☐ Any documentation that exists: how deployments work, what is customised, what breaks easily
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☒ THIRD-PARTY SERVICES CONNECTED TO THE SITE

☐ Analytics and Tag Manager: your email holds admin

☐ Search Console: verified under your account

☐ Forms and their notification destinations

☐ Email sending the site relies on (SMTP or transactional service)

☐ Payment, booking, chat or any embedded service accounts

☒ OPERATIONAL

☐ Every credential into your password manager as it arrives

☐ Renewal dates recorded: domain, hosting, licences, certificates

☐ The old party's access removed after transfer, and shared passwords rotated

☐ Backup schedule confirmed as running under your ownership

☒ FINAL VERIFICATION, DO NOT SKIP

☐ Log in to every account above yourself, from your own machine, before the final payment

☐ Confirm billing for each service now points at your card, not theirs

☐ Send yourself a test through every form

Refusal to transfer the registrar or hosting account. "You do not need access to that."
Licences that turn out to be pooled agency licences. A backup offered instead of account access. Any of these, pause the final payment and resolve it first, politely and in writing.

This checklist is the exit-moment slice of a bigger discipline. The digital asset ownership register on the resources page covers everything the business owns, all year round.



If you would rather have this done **with** you
than **to** you, this is the work I do.

START A CONVERSATION

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