

Technical Onboarding Handoff Audit

The customer is ready. The setup guide is in somebody else's inbox.

A short working sheet for the setup guide, checklist, resource index, or handoff form your team needs to find quickly.

Map the handoff

For each resource, write where it lives, when it is needed, and who keeps the destination current.

Resource or page	Where it lives	Journey moment	Owner	Last review

Choose one low-risk pilot

First handoff to test	Who will check the destination?
What will you measure?	Review date
Time to find and share the right resource; repeat requests for the current link; upkeep and support effort.	

A tag is a pointer. Your team owns the page, access rules, and review date.

Keep customer names, account records, credentials, access tokens, and confidential configuration out of this worksheet and any tag destination. A linked page may require the customer's usual sign-in.