

Domain Methods

Analytics Engineering Handoff Checklist

Use this checklist when transitioning analytics engineering work from a consultant to an in-house owner.

1. Scope and assets

- List models, dashboards, pipelines, and workflows in scope.
- Name the business decisions each asset supports.
- Confirm the future internal owner and backup owner.

2. Documentation standards

- Record metric definitions, inclusions, exclusions, and caveats.
- Note source systems, dependencies, QA checks, and release steps.
- Capture known risks and common failure modes.

3. Knowledge transfer sessions

- Architecture walkthrough completed.
- Business logic walkthrough completed.
- Change workflow and QA process reviewed.
- Internal owner has performed a live operating rehearsal.

4. Parallel running

- Internal owner has handled at least one routine change.
- Consultant reviewed output and closed context gaps.
- Stakeholders know who owns new requests.

5. Escalation rules

- Define what remains normal ownership versus escalation.
- Note executive-metric conflicts, new source integrations, and architecture changes that require broader review.

6. Final readiness check

- Access is provisioned and tested.
- Documentation exists for critical workflows.
- Open caveats are written down.
- 30-day post-handoff review is scheduled.