Hand-Over Process -
Professional Services to Managed Services

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1.Purpose and Scope

This document defines the standard process, responsibilities, and acceptance criteria for transitioning environments from Professional Services (PS) to Managed Services (MS).

This process:

● Applies to all PS → MS transitions

● Applies regardless of platform, service type, or client

● Is designed for repeatable execution, operational readiness, and risk control

● Is mandatory for all PS → MS transitions

Acceptance is performed per engagement and, where applicable, per environment. Operational responsibility transfers only upon formal acceptance as defined in Key Terms and Responsibilities.

2.Key Terms and Responsibilities

The terms defined in this section establish clear ownership and decision boundaries within the PS → MS handover process.

They are used consistently throughout this document to determine responsibility, acceptance, escalation, and risk ownership.

> **Note:** *These definitions are intentionally limited to terms that affect handover decisions, operational accountability, and incident escalation.*

Term	Definition
Professional Services (PS)	The delivery team responsible for designing, building, and validating the client environment.
Managed Services (MS)	The operations team responsible for day-to-day management once the environment is accepted.

Term	Definition
Handover	The controlled transition of responsibility from PS to MS, including documentation, access, and knowledge transfer.
Readiness	The state in which the environment, documentation, and knowledge transfer are complete and verifiable.
Acceptance	The formal confirmation by Managed Services (MS) that the environment meets Required-for-Acceptance conditions and can be supported operationally. Acceptance: • Transfers operational responsibility from Professional Services (PS) to Managed Services (MS) • Is documented through the completed Handover & Acceptance Checklist • Is effective only as of the acceptance effective date Early participation by Managed Services, including readiness reviews or knowledge transfer, does **not** constitute acceptance and does **not** transfer responsibility.
Gate	A mandatory validation checkpoint that must be passed before the process can proceed to the next phase. Failure to pass a gate blocks progression until required conditions are met or an approved exception is documented.
Exception	A documented and approved deviation from this process where one or more Required-for-Acceptance conditions are not met at the time of acceptance. Exceptions require explicit risk acknowledgement by Managed Services and approval by PS and MS leadership.
Escalation	The formal raising of an issue or incident for resolution when it cannot be addressed at the current operational level.

Term	Definition
	Escalation ownership is determined by handover status: • Prior to acceptance, escalations are owned by Professional Services. • After acceptance, escalations are owned by Managed Services.

Roles and Responsibilities

Role	Responsibility in PS → MS Handover
Professional Services (PS)	Designs, builds, and validates the client environment. Delivers technical readiness, documentation, and knowledge transfer required for handover. Retains operational responsibility until acceptance.
Managed Services (MS)	Validates readiness, participates in knowledge transfer, and determines acceptance. Assumes full operational responsibility after acceptance.
PS Lead	Accountable for PS readiness, documentation completion, and delivery of knowledge transfer.
MS Lead	Accountable for readiness validation and formal acceptance of the environment.
Project Manager (PM)	Coordinates handover activities, approvals, and timelines across PS, MS, and the client.
Client	Provides required inputs, approvals, and access as defined in scope.

Note: *Responsibilities outside the handover scope are governed by standard PS and MS operating procedures.*

3. Ownership, Decisions, and Sign-Off

This section defines how responsibility, accountability, and decision authority are applied throughout the PS → MS handover process.

Clear ownership is established at each stage of the handover to prevent ambiguity during delivery, acceptance, and post-handover escalation. The governance defined in this section applies to all PS → MS transitions and is enforced regardless of project timelines, delivery pressure, or client constraints.

3.1 RACI Chart for Handover Activities

The following RACI defines who is Responsible, Accountable, Consulted, and Informed for each major activity in the PS → MS handover process.

This RACI:

● Governs accountability throughout the handover lifecycle

● Clarifies decision authority at readiness and acceptance gates

● Is used as a reference during incident reviews, audits, and escalation

In the event of a conflict, this RACI takes precedence over informal agreements or assumptions.

Activity	PS	MS	PS Lead	MS Lead	PM	Client
Build and validate environment	R	I	A	I	C	C
PS readiness verification	R	I	A	I	C	I
Documentation completion	R	C	A	I	C	I
Knowledge transfer delivery	R	C	A	A	C	I
Joint readiness review	R	R	C	A	C	I
Final handover acceptance	C	R	I	A	R	I
Begin managed operations	I	R	I	A	C	I

Activities that do not meet readiness or validation requirements cannot progress to acceptance unless an approved exception is documented in accordance with <u>Exceptions and Risk Management</u>.

3.2 Readiness and Acceptance Evidence

This section defines the evidence required to demonstrate readiness and support formal handover and acceptance decisions. These artifacts provide a shared, auditable reference point for validation, sign-off, and post-handover accountability.

Artifacts are categorized based on whether they are Required-for-Acceptance or support operational readiness and traceability.