

Field deployment readiness pack

ROBOTICS / Example: prepare a customer handoff

Situation

An illustrative robotics team is preparing the transition from deployment engineers to the customer operating team. This example is not a manufacturer-approved operating procedure.

Objective

Make open dependencies, operator training needs, field issues, and support responsibilities visible before handoff. Match each requirement to an owner and reviewable evidence.

Proposed scope

- Confirm authorized use, operating constraints, and site dependencies.
- Identify operator roles and the applicable approved procedures.
- Record field issue impact, conditions, and reproduction context.
- Assign escalation, customer training, and handoff ownership.

This document does not authorize safety bypasses, firmware changes, hardware modifications, or work outside the vendor-approved operating envelope. Required specialists must confirm their responsibilities.

Evidence to review

Measure	How to evaluate it
Readiness closure	Track open requirements, owners, evidence, and unresolved blockers.
Operator readiness	Observe completion of approved tasks and correct escalation decisions.
Field reliability	Review interventions, repeated issues, and recovery effort in the agreed use case.

Decision gate

Handoff remains pending until responsible owners review and accept the agreed requirements, operator readiness, open issues, and support arrangements.

Field readiness worksheet

Use this worksheet to shape the conversation. Owners, thresholds, dates, and approvals are set for the actual engagement.

Review and test structure

Review item	Required evidence or expected behavior
Site dependencies	Requirement / source document / owner / evidence / status.
Operator check	Approved task / expected behavior / observed result / training follow-up.
Field issue	Time / operating context / impact / reproduction notes / approved evidence / owner.
Support handoff	Escalation contact / support hours / approved procedure / unresolved action / acceptance.

Ownership to confirm

Role	Example responsibility
Robotics vendor	Owns system limits, approved procedures, and designated engineering decisions.
Customer operations	Owns authorized users, operating readiness, and local escalation.
Deployment lead	Coordinates evidence, training needs, open actions, and the handoff review.

Decision record

Record: requirements reviewed / training evidence / open issues accepted / responsible approvers / next review date.

Open questions / next actions