CLIENT OFFBOARDING CHECKLIST TEMPLATE

Client: **[Include full company name and primary contact]**
Offboarding Duration: **[Specify exact start and end dates]**
Project Manager: **[Name]**
Team Members: **[List team names and roles]**

Executive Summary

[Overall Offboarding Goal]:

Example: Complete the professional-client transition, transfer all deliverables, settle the accounts, and establish positive relationships for future referrals and potential collaborations.

Process Performance Metrics

[Deliverable Completion]:

- ☐ All Deliverables Completed
- ☐ Partial Completion

[Timeline Compliance]:

- ☐ On Schedule
- ☐ Delayed

[Client Satisfaction]: [Rating 1-5]

Example: 4.8/5 based on exit survey

Contractual Obligations Review

Obligation	Status	Completion Date	Notes
e.g. Website Development	[Complete/Pending]	[Date]	[Details]
e.g. Content Creation	[Complete/Pending]	[Date]	[Details]
e.g. Early Termination Clauses	[Complete/Pending]	[Date]	[Details]

Guidance:

- Review all contractual obligations thoroughly.
- Document any special conditions or guarantees.
- Address any unfinished agreements.

Transition Timeline

Task	Due Date	Responsible Person	Status
e.g. Final Deliverable Submission	[Date]	[Name]	[Complete/Pending]
e.g. Offboarding Meeting	[Date]	[Name]	[Complete/Pending]
e.g. Access Revocation	[Date]	[Name]	[Complete/Pending]

Guidance:

- Allow buffer time for unexpected issues.
- Communicate the timeline to all stakeholders.

Asset and Data Handover

Asset Type	Transfer Method	Handover Date	Verification
e.g. Design Files	[Shared Folder/Drive]	[Date]	[Verified by]
e.g. Log in Credentials	[Secure Document]	[Date]	[Verified by]
e.g. Brand Guidelines	[Shared Folder/Drive]	[Date]	[Verified by]

Guidance:

- Organize files with a clear folder structure.
- Include comprehensive documentation.
- Verify that the client can access everything.

Final Offboarding Meeting

Meeting Date: [Date]

Attendees: [List all participants]

Meeting Notes: [Summary of discussion]

Agenda Items:

e.g.

- *Review of completed work.*
- *Demonstration of deliverables.*
- *Answering client questions.*
- *Discussion of maintenance recommendations.*
- *Next steps and follow-up timeline.*

Financial Settlement

Item	Amount	Status	Completion Date
e.g. Final Invoice	[$X, XXX]	[Sent/Paid]	[Date]
e.g. Expense Reconciliation	[$XXX]	[Complete/Pending]	[Date]
e.g. Payment Documentation	[N/A]	[Provided/Pending	[Date]

Guidance:

- Provide complete payment history.
- Document all financial transactions.
- Confirm settlement with the client.

Access and Permissions Management

System/Tool	Access Status	Removal Date	Verification
e.g. Project Management Tool	[Revoked/Pending]	[Date]	[Details]
e.g. Client Portal	[Time-limited until (date)]	[Date]	[Details]
e.g. Design Software	[Revoked/Pending]	[Date]	[Details]

Guidance:

- Document all access changes.
- Set portal access limits (30-90 days).
- Ensure all sensitive data is secured.

Feedback Collection

Feedback Method: [Survey/Call/Email]

Completion Status: [Complete/Pending]

Key Insights: [Summary of main feedback points]

Sample Survey Questions:

1. How satisfied were you with our deliverables? (1-5)
2. How would you rate our communication throughout the project? (1-5)
3. What did you find most beneficial about working with us?
4. What areas could we improve in?
5. Would you recommend our services to others? (1-5)

Relationship Maintenance

Action	Due Date	Responsible Person	Status
e.g. Thank You Note	[Date]	[Name]	[Complete/Pending]
e.g. Follow-up Check-in	[Date]	[Name]	[Scheduled/Pending]
e.g. Testimonial Request	[Date]	[Name]	[Complete/Pending]

Guidance:

- Send personalized thank you messages.
- Schedule follow-up communication.
- Maintain professional relationships.

Internal Review

Review Item	Findings	Action Items	Owner
e.g. Project Execution	[Insights]	[Improvements]	[Name]
e.g. Client Communication	[Insights]	[Improvements]	[Name]
e.g. Team Performance	**[Insights]**	[Improvements]	[Name]

Guidance:

- Document lessons learned.
- Update internal processes.
- Reassign team members.

Knowledge Transfer (Creative Projects)

Knowledge Asset	Transfer Method	Completion Date	Verification
e.g. Design Files	[Shared folder]	[Date]	[Verified by]
e.g. Asset Management Guide	[Documentation]	[Date]	[Verified by]
e.g. Workflow Instructions	[Training session]	[Date]	[Verified by]

Guidance:

- Organize files with clear naming conventions.
- Create guides for tools and workflows.
- Record video tutorials for future reference.

Client Portal Management

Portal Element	Status	Responsible Person	Notes
e.g. Organized Deliverables	[Complete/Pending]	[Name]	[Details]
e.g. Access Time Limits	[Set/Pending]	[Name]	[Details]
e.g. Thank You Message	[Complete/Pending]	[Name]	[Details]
e.g. Service Recommendations	[Complete/Pending]	[Name]	[Details]

Guidance:

- Organize work in clearly labeled folders.
- Set access time limits (30-90 days).
- Include branded thank-you messages.

Issues and Challenges

Issue	Impact	Resolution	Status
e.g. Delayed Deliverable	[Details]	[Action taken]	[Resolved/Pending]
e.g. Communication Gap	[Details]	[Action taken]	[Resolved/Pending]
e.g. Scope Change	[Details]	[Action taken]	[Resolved/Pending]

Guidance:

- Document all issues that arose.
- Focus on resolution, not blame.
- Identify preventive measures.

Follow-Up and Accountability

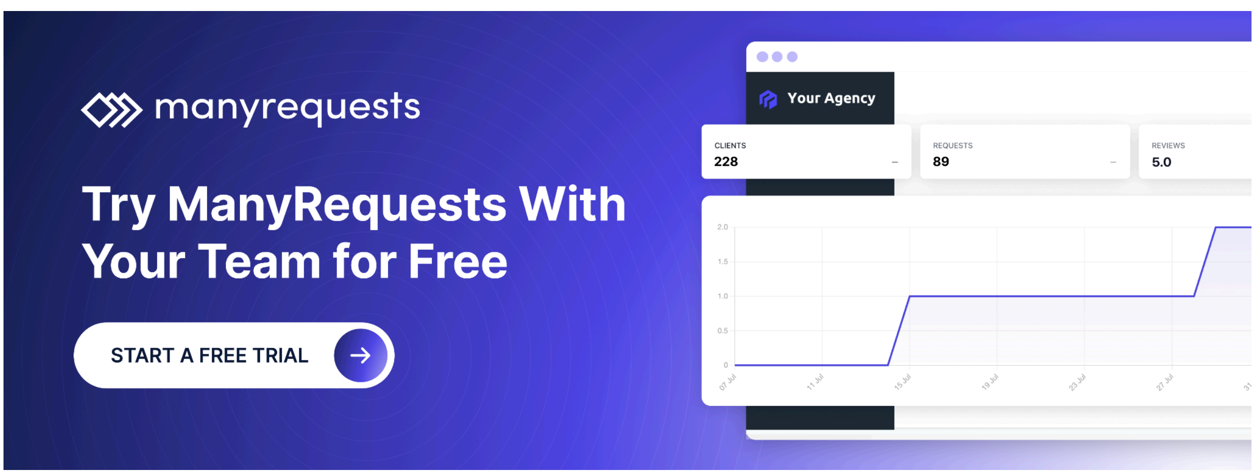
Action Item Tracking

Action Item	Owner	Target Date	Status	Progress Notes
[Specific Action]	[Name]	[Date]	[Status]	[Notes]

Signatures

Project Manager: [Name]
Account Manager: [Name]
Date: [Date]

Note: This checklist is a living document. Continuously refine and adapt it to suit your agency's evolving needs.



More Useful Resources:

- [Free Employee Review Performance Template [Docs / DOCX]]
- [7 Productized Service Business Models to Scale Your Agency]
- [18 Must-Have Creative Agency Tools for 2025]