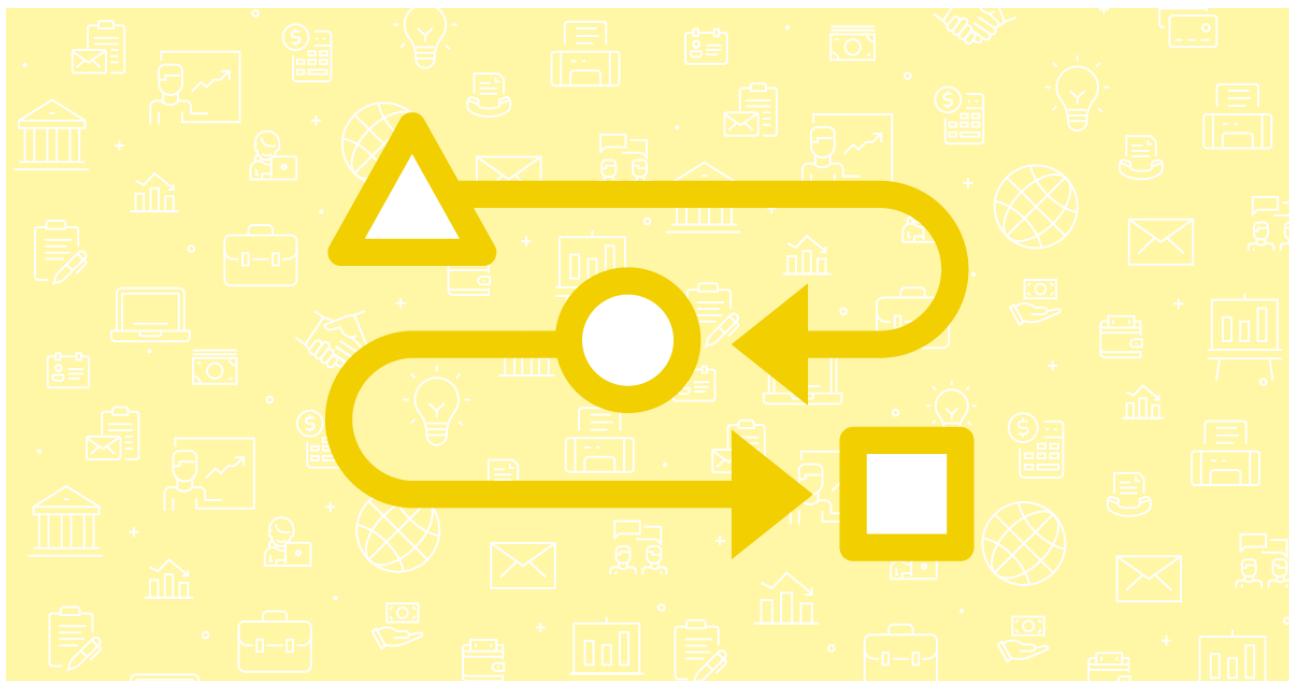


Off-Boarding Client Checklist For Digital Marketing Clients

Whether you are an agency, small business, or freelancer, use this free digital marketing client off-boarding checklist to ensure a professional and easy transition process for your clients.



Define "end of contract" Date with Client

- ☐ Include a thank you email for appreciation of clients' business
- ☐ Include a final deliverables date
- ☐ Include a final invoice with due date
- ☐ Final invoice has been paid before handing off final project

Create an Off-Boarding Digital Folder for Client

- ☐ Include final project (all digital files) *keep a backup copy for yourself
- ☐ Include all documents and files
- ☐ Include an end of contract deliverables checklist for the client *request a copy back
- ☐ Include any training materials, resources, or FAQ's client may need
- ☐ Include a project goals achieved document/email

Check-in Email

- ☐ Check-in to make sure client was happy with service provided
- ☐ Ask for a testimonial

- ☐ Pitch them any additional services you can provide them in the future

Final Off-Boarding Steps

- ☐ Send a personalized thank you note
- ☐ Promote their business on social media, on your blog/website as a casestudy (showcase project)
- ☐ Follow-up/check-in email around three to four months after the project has ended

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