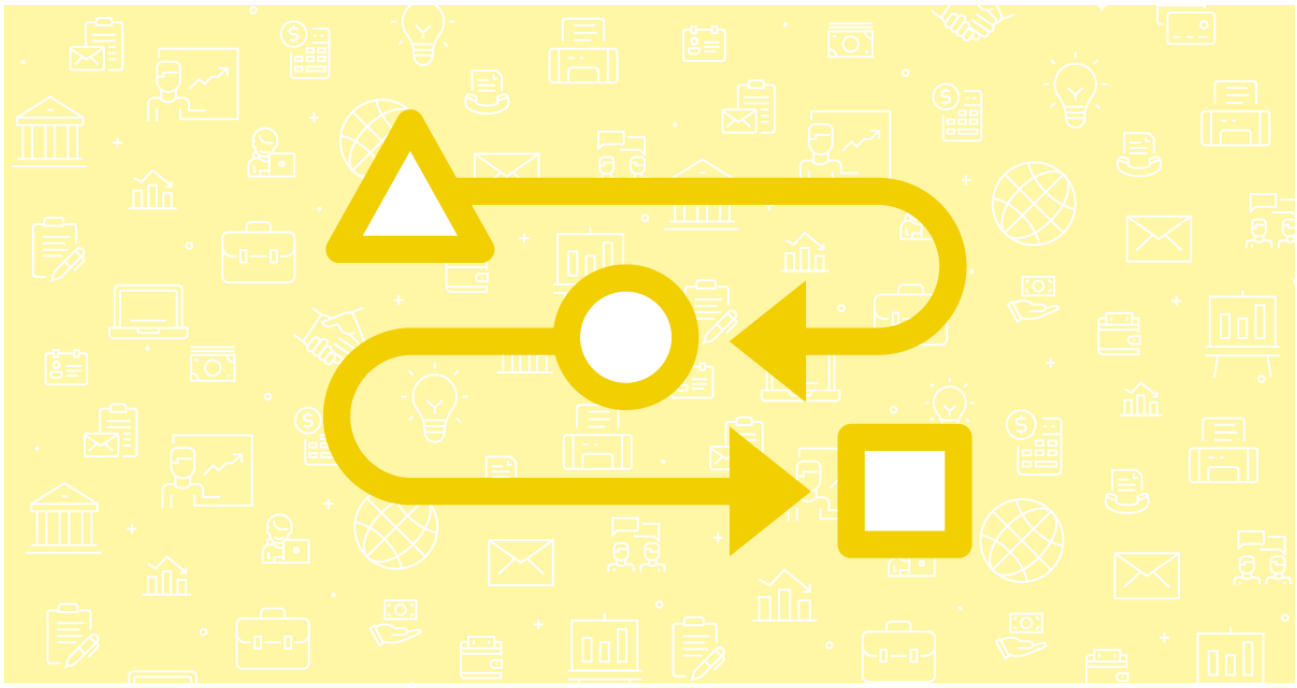
Off-Boarding Client Checklist For Digital Marketing Clients

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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