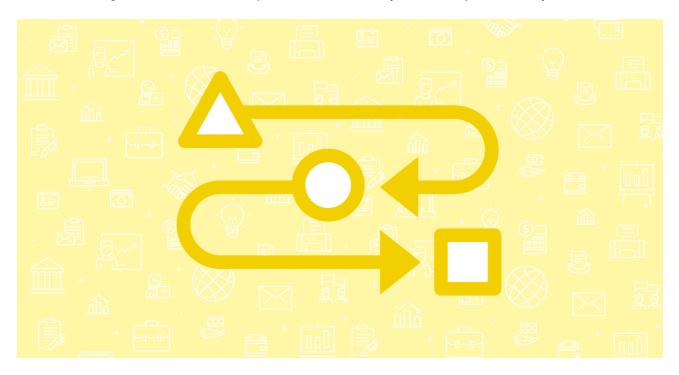
Off-Boarding Client Checklist For Digital Marketing Clients

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

Check-in Email

Ask for a testimonial

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 to make sure client was happy with service provided

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 enMake and Share Free Checklists checkli.com