

CLIENT OFFBOARDING CHECKLIST

This checklist is provided by Clientish as a free, editable starting point. Assign an owner, fill the owner and due-date columns, and run it for every client who leaves — whether they are finishing, pausing, or moving on. A clean exit protects your reputation and earns the testimonial and referral.

Client: [Client Name] | **Offboarding owner:** [Name] | **End date:** [Date] | **Reason:** [finished / paused / left]

How to use: tick each box as it is completed, and fill the Owner and Due columns so every task has a name and a date.

Phase 1 — Pre-Exit (Final Two Weeks)

Done	Task	Owner	Due
☐	Confirm the end date in writing	☐	☐
☐	Assign the offboarding owner	☐	☐
☐	Audit open work (done / in progress / will not complete)	☐	☐
☐	Resolve billing status (outstanding invoices, upcoming renewals)	☐	☐
☐	Start drafting the handoff packet (see below)	☐	☐
☐	Schedule the exit / handover call	☐	☐

Phase 2 — The Exit (Final Week)

Done	Task	Owner	Due
☐	Deliver all final work + handoff packet with access instructions	☐	☐
☐	Transfer accounts,	☐	☐

	assets, and logins that belong to the client		
☐	Send the final invoice	☐	☐
☐	Cancel subscriptions / recurring charges	☐	☐
☐	Hold the exit conversation: recap wins, gather feedback, ask for a testimonial	☐	☐
☐	Revoke access — remove your access to their tools AND their access to yours	☐	☐

Phase 3 — Post-Exit (30 to 90 Days)

Done	Task	Owner	Due
☐	Send a genuine thank-you note	☐	☐
☐	Friendly 30-day check-in (not a sales pitch)	☐	☐
☐	Ask for a referral (separate from the testimonial, once settled)	☐	☐
☐	Archive the project internally + record relationship notes	☐	☐

Handoff Packet — What to Include

Assemble in one organised handover, not a trickle of files.

Done	Item
☐	Summary of what was delivered
☐	Open / in-progress items and their status
☐	Credentials and system access the client needs
☐	Operating instructions for anything you built
☐	Key files and final assets

☐	Key contacts (yours and any third parties)
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Access Revocation — Both Directions

The most commonly skipped step. Check off every access in both directions.

Done	Access	Direction	Notes
☐	Project management tool	Yours to theirs / theirs to yours	☐
☐	Shared drives / storage		☐
☐	Analytics / ad accounts		☐
☐	CMS / hosting / domain		☐
☐	Social / publishing accounts		☐
☐	Email / communication tools		☐
☐	Client portal access		☐

Exit Conversation — Prompts

Use these in the Phase 2 exit call. Gather feedback, then ask for the testimonial.

1. What worked well for you in this engagement?
2. What could we have done better?
3. Did the work achieve what you hoped? (Capture the result — it makes the best testimonial.)
4. Would you be willing to share a short testimonial about the results? *(ask here, while fresh)*
5. Is there anything we can hand over or document to make your transition smoother?

Sign-off

Offboarding completed by:	[Owner]
Final work delivered on:	_____
Access revoked (both directions) on:	_____
Final invoice settled on:	_____
Testimonial requested:	☐ Yes Referral requested (30-60d): ☐ Yes

Running the client relationship once this is in place? Clientish gives your client a branded portal on your own subdomain with their orders, invoices and support tickets in one place. Start a 7-day free trial at the Clientish site.