Client offboarding checklist

Every task counts from the project end date. Write the end date once, then the due dates.

Client: _____ Project: _____

Project lead: _____ Project end date: _____

Two weeks out

Agree what finishing looks like, and list everything that has to move.

Task	Owner	When	Due date	Done
Confirm the end date in writing, and what "done" means for the last deliverables	Account lead	14 days before		
List every open deliverable and agree what ships before the end date	Project lead	14 days before		
Read the contract for what you owe at the end: files, source files, licences, notice	Account lead	12 days before		
List every client account your team can reach, and every place the client can reach in your tools	Project lead	12 days before		
Tell the client what they will get, in which format and by which date	Account lead	10 days before		
Book a 30-minute wrap-up call for the last week	Account lead	10 days before		
Write plain how-to notes: how things work, renewal dates, who to call	Team	8 days before		

Last week

Deliver, hand back the files and accounts, and say thank you properly.

Task	Owner	When	Due date	Done
Deliver the final work and ask the client to confirm they have it	Project lead	5 days before		
Put final files, source files, fonts and licences in one shared folder	Team	5 days before		
Move ownership of domains, ad accounts, analytics and other client accounts to the client	Project lead	4 days before		
Hold the wrap-up call: what went well, what is still open, what comes next	Account lead	3 days before		

Task	Owner	When	Due date	Done
Send the final invoice from your billing tool and check that earlier invoices are paid	Finance	2 days before		
Send the offboarding email with the folder link, the notes and the access list	Account lead	1 day before		

End date

Close access in both directions on the same day.

Task	Owner	When	Due date	Done
Remove your team from the client's accounts, or ask the client to remove you	Project lead	End date		
Remove the client from your project board, chat channels and shared drives	Project lead	End date		
Change shared passwords and delete saved client logins from your password manager	Team	End date		
Turn off scheduled posts, automations and forms that still run for this project	Team	End date		

After the end date

Feedback first, then proof, then keep in touch.

Task	Owner	When	Due date	Done
Update your client list with the end date and the main contact	Account lead	1 day after		
Send a short feedback form	Account lead	3 days after		
Hold an internal review: what to repeat and what to change	Project lead	7 days after		
Ask for a testimonial if the feedback was good	Account lead	7 days after		
Ask for permission to show the work in your portfolio	Account lead	10 days after		
Archive the project files and delete client data you no longer need	Team	14 days after		
Add the work to your portfolio, within the limits the client agreed	Team	21 days after		
Ask for a case study once the results are in	Account lead	45 days after		

Task	Owner	When	Due date	Done
Send a friendly check-in and ask if anyone they know needs help	Account lead	90 days after		

Accounts and tools to close (yours and theirs)

Notes for next time

A planning aid, not legal advice: your contract decides what you owe the client at the end. The editable sheet with due dates worked out for you is at hornetforms.com/blog/client-offboarding-checklist.