



CLIENT OPERATIONS

Client offboarding checklist

A closeout checklist for wrapping delivery, handing over files, confirming final billing, and leaving the relationship in good shape.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

An engagement is complete and you want a clean, professional finish.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Confirm all deliverables**

- ☐ 02 **Share final files and access**

- ☐ 03 **Document key decisions**

- ☐ 04 **Send final invoice**

- ☐ 05 **Request feedback appropriately**

- ☐ 06 **Schedule a future check-in**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.