



CLIENT OPERATIONS

Retainer renewal checklist

A renewal planning checklist that turns a past period of work into a clear, evidence-based conversation about what comes next.

A practical worksheet from Stelaah

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

HOW TO USE THIS

A recurring engagement is approaching its renewal point.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Review work completed**

- ☐ 02 **Summarize results and lessons**

- ☐ 03 **Check unused or new needs**

- ☐ 04 **Revisit scope and price**

- ☐ 05 **Prepare next-period options**

- ☐ 06 **Confirm the decision and date**

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.