

TemplateForge Client Offboarding & Retention Kit - Free Sample

A TemplateForge workbook for freelancers and service businesses

Format: PDF workbook

Access: Permanent access to the downloadable PDF workbook, with no time-based expiry while the offer remains available.

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FREE SAMPLE

This sample shows representative material from the Client Offboarding & Retention Kit without requiring an account or purchase.

PROJECT WRAP-UP CHECKLIST EXCERPT

1. Confirm the final scope is complete

Customization guidance: Compare delivered work against the signed scope and record any agreed exclusions or follow-up items.

2. Collect final approval in writing

Customization guidance: Ask the decision-maker to confirm approval and note the date in the project record.

HANDOFF GUIDE EXCERPT

Subject: Your project handoff and next steps

Hi [Client name],

The project is ready for handoff. Here is the final path:

Final deliverables: [link or folder]

What changed: [one-sentence summary]

How to use it: [short instruction or link]

Known limitations: [anything to watch]

Open items: [owner and next date, or "none"]

Support window: [dates and what is included]

Please review the files by [date] and reply with any handoff questions. I am also including a short feedback request so I can improve the way I work with clients.

Thank you,
[Your name]

The complete workbook includes all five parts: the full wrap-up checklist, client handoff guide, feedback request, referral request, and renewal or ongoing-support proposal, each with ready-to-use copy and customization guidance.