Client offboarding checklist

A practical kit for final approval record, archive index, closure email.

This is a mock PDF describing a proposed product. It does not contain the promised guide, activities or templates. The product is not on sale.

What it is

Client offboarding checklist is a focused, self-guided planning kit for independent designers, writers and consultants. It organizes final approval record, archive index, closure email into a practical workflow, with editable worksheets and a completed fictional example. Start with your own situation, make the decisions on the worksheets, and finish with a plan you can revisit. The completed example illustrates the method; it is not a customer result.

Who it is for

Independent designers, writers and consultants

What you will make

Create a working set of final approval record, archive index and closure email, tailored to your own project.

Proposed one-time price

USD 32.00 / EUR 29.00 / GBP 25.00 / CAD 45.00

AUD 49.00 / CHF 28.00 / AED 119.00

Fixed prices by currency, not live exchange conversions. Final prices and tax treatment will be confirmed before sales open.

Inside the planned edition

01 Final approval record: a purpose-built worksheet with field explanations and prompts.

02 Archive index: a purpose-built worksheet with field explanations and prompts.

03 Closure email: a purpose-built worksheet with field explanations and prompts.

04 A start-here guide explaining the sequence, preparation and completion criteria.

05 A completed fictional example showing how the final approval record connect to the archive index.

06 A final review checklist, reusable blank copies and a short troubleshooting section.

How to use it

Read the start-here guide, gather your project notes, complete the final approval record, then work through the archive index and closure email. Compare with the fictional example and finish with the review checklist. Reuse the blank worksheets for the next project.

Planned formats and language

Planned: accessible PDF guide, editable DOCX worksheets and a printable A4/US Letter workbook. English-led instructions. Persian text is included where specified; the interface language does not change the purchased edition.

License

One organization, up to 10 internal users. You may share completed outputs with your own clients or participants. Do not resell, sublicense or distribute the blank source files.

Not included

No live service, consulting, external subscriptions, physical materials or completed work on your behalf. Specialist legal, medical and financial advice is not included.

Delivery, receipts and support

When the final edition is released: verified payment unlocks the purchased files in My purchases and creates an itemised billing document. Access uses private, expiring download links. Five downloads per file; contact support for access problems. Server access records support delivery enquiries.

Customer reviews

No customer testimonials yet. Reviews will come from verified purchasers who consent to publication. No illustrative quote is presented as a customer experience.