

Customer offboarding template

Customer offboarding is often overlooked, but it’s just as crucial as *onboarding* in the SaaS industry.

Offboarding allows you to gather invaluable insights, refine products/services, reduce churn, and most importantly, leave the door open for the customer to return in the future.

This customer offboarding template provides a structured and supportive approach to concluding client engagements. It guides you through each stage of offboarding, from project closure and data management to final billing and client appreciation.

Follow these steps so your team can maintain strong client relationships, gather valuable insights for future improvements, and leave a positive final impression.

Project summary

Project details	Description
Customer name	[Insert customer name]
Project start date	[Start date]
Project end date	[End date]
Project description	[Brief description based on creative brief or project proposal]

Activities checklist

Activity	Description	
Contract review	Review original contract terms.	☐
Team consultations	Consult with relevant departments (e.g., creative, services teams) for insights.	☐
Review	Review meeting minutes, recorded calls, and related	☐

communicati documents for project history.
on records

Communication plan

Timeline	Action	
Four weeks prior	Provide updates on all deliverables and timelines; schedule final meeting if not yet scheduled.	☐
Two weeks prior	Send reminders about how and when deliverables will be handed off; confirm point of contact for any issues.	☐
One week prior	Express enthusiasm for the final meeting and confirm if there are any outstanding questions from the client’s side.	☐

Final handoff meeting

Agenda	Notes	
Review deliverables	Ensure all planned deliverables are ready and align with the client’s vision for the project.	☐
Capture testimonials	Request client feedback and ask for testimonials, if permitted. Alternatively, schedule a follow-up if they need leadership approval.	☐
Photos/docu mentation	Reserve time for capturing any project-related photos or documentation with the client.	☐

Final check (housekeeping)

Task	Description	
Access confirmation	Confirm where and how they can access final deliverables.	☐
Login information	Send login credentials or transfer administrative access as required.	☐

transfer		
File return	Return any files or documents necessary for the client.	☐

Appreciation and follow-up

Action	Description	
Thank you note	Send a personalized thank-you note or token of appreciation.	☐
Testimonial follow-up	Follow up on testimonials or referrals as discussed during the final meeting.	☐
Future opportunities	Inform the client about opportunities for reactivating services or accessing company resources if they decide to return.	☐

Final billing and account settlement

Billing item	Details	
Outstanding invoices	List any unpaid invoices and request payment by [due date].	☐
Refunds or credits	If applicable, detail any credits or refunds and confirm they will be processed within [number of days] business days.	☐

Internal notes for offboarding

Task	Assigned to	Notes	
CRM update	[Team member]	Update the client's status and ensure all details are archived.	☐
Data deletion compliance	[Team member]	Ensure data deletion follows GDPR and other regulations.	☐
Notification to departments	[Team member]	Notify billing, IT, support, and any other relevant departments of the service termination.	☐

