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**SOP MASTER- Client Offboarding- Systems Vault**

**PREREQUISITES**

[Project Management Tool- Teamwork](http://sarahnoked.com/teamwork)

[Master: Client Details- Systems Vault](https://docs.google.com/spreadsheets/d/1jHG9MEvCmCceeMhdQoOiuUFtzoz0OX240_Fw3Km_i98/edit?usp=sharing)

Google Drive

[SOP- Project & Task Management- Systems Vault](https://docs.google.com/document/d/1c7REsC8MsWBBDmtKR6bpULsGVNPt-JGtC7Xwjx9xThg/edit)

[SOP- Archiving Client Project- Systems Vault](https://docs.google.com/document/d/1IrQ8D2I29rus5i13HJ0vqg-TuQXmzv72EggXZ-DDxVQ/edit?usp=sharing)

[Template: Client Farewell- Systems Vault](https://docs.google.com/document/d/1F67ns7I_A6V3zOywCEka_a_xXb3Ft-y8bgmFVmnGCt4/edit?usp=sharing)

**PURPOSE**

When a client contract is terminated, we need to ensure we update our files accordingly and offboard the client smoothly and amicably.

**POLICY**

**When a Client terminates or puts their contract on hold, Sarah is to be notified immediately and task list and due dates are assigned following.**

We track time as internal for offboarding processes.

**Client terminated:** setup should take place every time a client is terminated or end their contract with us. The client’s Project Manager is responsible for client offboarding. Client boarding tasks are immediately added to Teamwork and if we still have work with the client, those offboarding tasks may be moved to the end of the month.

Clients must give Sarah Noked OBM one month notification for termination.

**Client on hold:** Clients are free to put their contracts on hold for one month and we will keep their spot warm. If they push it longer for a month, we don’t hold their spot. We do make special considerations for special clients if we have availability.

**PARTY**

Online Business Manager

**PROPERTY**

Online Business Manager

**PROCESS**

Part 1: Clean Up

Part 2: Farwell

**PROCEDURE**

**Part 1: Clean Up**

1. Set up and assign responsibilities and due dates to the “SN Client Offboarding: Client’s Name- Business Name” task list in [Teamwork PM](http://sarahnoked.com/teamwork) to the client project created in part 1. Refer to [SOP- Project & Task Management- Systems Vault](https://docs.google.com/document/d/1c7REsC8MsWBBDmtKR6bpULsGVNPt-JGtC7Xwjx9xThg/edit) and navigate to the section ‘Creating a task list from a template’.

This task list includes:

* 1. (not recurring) Notify relevant parties (team members to stop work, etc)
  2. (not recurring) Update client details to [Master: Client Details- Systems Vault](https://docs.google.com/spreadsheets/d/1jHG9MEvCmCceeMhdQoOiuUFtzoz0OX240_Fw3Km_i98/edit?usp=sharing) with a strike through and update the contract termination date. Strikethrough and then hide client details (rows) on other tabs.
  3. (not recurring) Delete Teamwork Chat chat channel for client and add SN team members with the [SOP- Setting up a Client Channel- Systems Vault](https://docs.google.com/document/d/1L6yVCrnSRMURcwvw3T2q0KsRzDHyK3Lk675WZ6GL8T8/edit?usp=sharing)
  4. (not recurring) Archive Client folder in the cloud
  5. (not recurring) Archive Client Project [SOP- Archiving Client Project- Systems Vault](https://docs.google.com/document/d/1BXnyBX9E1Bwwj5G7D-_gNzOIjkoCfKNOLm0tJfTyq6I/edit?usp=sharing)
  6. (not recurring) Remove Client from Invoicing documentation and systems.
  7. (not recurring) Transfer files and ownership of files
  8. (not recurring) Remove Access to passwords, email handles,

**Part 2: Farewell**

1. Set up and assign responsibilities and due dates to the “SN Client Farwell: Client’s Name- Business Name” task list in [Teamwork PM](http://sarahnoked.com/teamwork) to the client project created in part 1. Refer to [SOP- Project & Task Management- Systems Vault](https://docs.google.com/document/d/1c7REsC8MsWBBDmtKR6bpULsGVNPt-JGtC7Xwjx9xThg/edit) and navigate to the section ‘Creating a task list from a template’.

This task list includes:

* 1. (not recurring) Farewell Email to / Conversation with Client. See [Template: Client Farewell- Systems Vault](https://docs.google.com/document/d/1F67ns7I_A6V3zOywCEka_a_xXb3Ft-y8bgmFVmnGCt4/edit?usp=sharing)
  2. (not recurring) Farewell Email to / Conversation with Client’s Team
  3. (not recurring) Parting Gift, if applicable
  4. (not recurring) Request for Testimonial

**Created by:**

**Department:** Delivery

**Date:**

**Revised:**

**Revised by:**