next8n

OFFBOARDING CHECKLIST

Workflow Automation Delivery Framework

ENTERPRISE EDITION

Version: 2.0

Date: December 28, 2025

Author: Mirza Iqbal

Contact: mirza.iqbal@next8n.com

Table of Contents

Knowledge Transfer

Transfer Sessions

Training Materials

Q&A Period

Access Removal

n8n Access

Third-Party Access

Credential Security

Data Handling

Client Data

Consultant Data

Execution Logs

Financial Close

Outstanding Payments

Retainer Termination (If Applicable)

Relationship Close

Feedback Collection

Testimonial & Reference

Future Relationship

Final Handover Package

Deliverables Checklist

Delivery Confirmation

Post-Offboarding

Internal Archive

Verification (30 Days Later)

Offboarding Sign-Off

Emergency Offboarding (If Needed)

Rapid Exit Checklist

Offboarding Checklist

Complete Exit & Transition Guide

Offboarding Scenarios

Scenario Identification

```
Offboarding type:
    Project complete, no retainer
    Retainer ending
    Client switching providers
    Client bringing in-house
    Client no longer needs service
    Mutual decision to part ways
    Other: _____

Exit timeline:
    Notice received: _____
    Target end date: _____
    Transition period: _____
```

Exit Planning

Initial Steps

```
Exit request documented
    Request date: _____
    Requested by: _____
    Reason given: _____
    _____

Contract terms reviewed
    Notice period required: _____
    Exit clause conditions: _____
    Final billing terms: _____

Transition timeline agreed
    Start date: _____
    End date: _____
    Key milestones: _____
```

Stakeholder Notification

```
Internal team notified
Any subcontractors notified
Transition plan shared with client
Key dates confirmed
```

Technical Handover

Workflow Documentation

```
All workflows documented
    Workflow 1: _____
        Description written
        Trigger explained
        Logic documented
        Error handling noted

    Workflow 2: _____
        Description written
        Trigger explained
        Logic documented
        Error handling noted

    Workflow 3: _____
        Description written
        Trigger explained
        Logic documented
        Error handling noted
```

Workflow Exports

```
All workflow JSONs exported
    Location: _____

Subworkflows exported
    Location: _____

Error workflows exported
    Location: _____

Exports tested (can be re-imported)
Version/date documented
```

Credential Inventory

```
Complete credential list created
    Format: Name | Service | Owner | Notes

    Credential 1: _____
    Credential 2: _____
    Credential 3: _____
    Credential 4: _____
    Credential 5: _____

No consultant-owned credentials remaining
Client owns all credentials
Rotation recommended for shared secrets
```

Integration Documentation

```
All integrations documented
    Integration 1: _____
        API endpoint: _____
        Auth method: _____
        Key contacts: _____

    Integration 2: _____
        API endpoint: _____
        Auth method: _____
        Key contacts: _____

Third-party dependencies listed
Renewal/billing info documented
```

Knowledge Transfer

Transfer Sessions

```
Knowledge transfer call scheduled
    Date: _____
    Duration: _____
    Attendees: _____

Topics covered:
    Workflow overview
    How to monitor
    How to troubleshoot
    Common maintenance tasks
    How to make updates
    Where documentation is
    Who to contact for integrations
```

Training Materials

```
Walkthrough videos provided
    Video 1: _____
    Video 2: _____

Written guides provided
FAQ document delivered
Troubleshooting guide delivered
```

Q&A Period

```
Q&A period offered
    Duration: _____
    Start: _____
    End: _____

Questions answered and documented
Additional documentation created if needed
```

Access Removal

n8n Access

```
Consultant access removed
    Account: _____
    Removed by: _____
    Date: _____

Any team member access removed
Verified no orphan accounts
```

Third-Party Access

```
Access to client tools removed:
    CRM: _____
    Email/Calendar: _____
    Project management: _____
    Communication (Slack, etc.): _____
    Other: _____

All access verified removed
```

Credential Security

```
Any shared credentials rotated
    Credential 1: _____  Rotated
    Credential 2: _____  Rotated

Client notified to rotate passwords
No consultant access to any secrets
```

Data Handling

Client Data

```
All client data identified
    Location 1: _____
    Location 2: _____

Data handling action:
     Returned to client
     Deleted
     Retained (with permission)
    Documentation: _____
```

Consultant Data

```
Project files archived
    Location: _____
    Retention period: _____

Test data deleted
Sensitive client info removed
Sample data anonymized or deleted
```

Execution Logs

```
Execution log handling discussed
Client responsibility confirmed
Pruning settings documented
```

Financial Close

Outstanding Payments

```
All invoices sent
    Invoice 1: $_____ Sent: _____
    Invoice 2: $_____ Sent: _____

All payments received
    Payment 1: $_____ Received: _____
    Payment 2: $_____ Received: _____

Final invoice sent
    Amount: $_____
    Date sent: _____
    Due date: _____

Final payment received
    Date: _____
```

Retainer Termination (If Applicable)

```
Retainer end date confirmed
Pro-rated amount calculated (if needed)
Final retainer invoice sent
Recurring billing cancelled
Client confirmed cancellation
```

Relationship Close

Feedback Collection

```
Feedback requested
   Method:  Call  Survey  Email

Feedback received
   What went well:
   _____
   _____

   What could improve:
   _____
   _____

   Overall satisfaction: ____ / 10
```

Testimonial & Reference

```
Testimonial requested
    Received
    Declined
   Text: _____
   _____

Case study permission requested
    Approved
    Declined

Reference permission requested
    Approved
    Declined
```

Future Relationship

```
Door left open for future work
Best contact method confirmed
LinkedIn connection maintained
Newsletter/updates opt-in discussed
```

Final Handover Package

Deliverables Checklist

```
All workflow exports (JSON)
Subworkflow exports
Technical documentation
Walkthrough videos
Credential inventory
Integration documentation
Troubleshooting guide
FAQ document
Architecture diagrams
Data flow diagrams
Contact information for integrations
```

Delivery Confirmation

```
Package delivered to client
    Method: _____
    Date: _____

Client confirmed receipt
    Date: _____

Client confirmed access to all materials
```

Post-Offboarding

Internal Archive

```
Project folder organized
Key learnings documented
Templates updated for future use
Time tracking finalized
Project marked complete in PM system
```

Verification (30 Days Later)

```
No outstanding issues
No access concerns
Relationship healthy
Referrals possible
```

Offboarding Sign-Off

```
╔══════════════════════════════════════════════════════════╗
║                  OFFBOARDING SIGN-OFF                     ║
╠══════════════════════════════════════════════════════════╣
║                                                          ║
║ Project: _____         ║
║ Client: _____          ║
║                                                          ║
║ Exit Date: _____       ║
║                                                          ║
║ Technical handover complete:     Yes   No                ║
║ Knowledge transfer complete:     Yes   No                ║
║ Access removed:                  Yes   No                ║
║ Data handled properly:           Yes   No                ║
║ Financials closed:               Yes   No                ║
║ Documentation delivered:         Yes   No                ║
║ Client confirmed receipt:        Yes   No                ║
║                                                          ║
║ OFFBOARDING COMPLETE:            Yes   No                ║
║                                                          ║
║ Notes: _____           ║
║ _____          ║
║                                                          ║
║ Completed by: _____    ║
║ Date: _____            ║
║                                                          ║
╚══════════════════════════════════════════════════════════╝
```

Emergency Offboarding (If Needed)

Rapid Exit Checklist

```
When relationship ends abruptly:

 Document everything immediately
 Remove all access within 24 hours
 Export any work completed
 Send formal notice via email
 Invoice for work completed
 Rotate any shared credentials
 Preserve records for potential disputes
 Consult legal if needed
```

End of Checklists. See `guides/` **for detailed how-to guides.**

Workflow Automation Delivery Framework | next8n | https://next8n.com

This document is confidential and intended for authorized use only.