next8n

OFFBOARDING GUIDE

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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Professional Exit & Transition Process

Offboarding Philosophy

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║                                                    ║
║   A graceful exit protects your reputation and leaves the   ║
║   door open for future work. Always exit professionally.    ║
║                                                    ║
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```

Key Principles:

1. No client should be held hostage
2. Documentation enables independence
3. Clean transitions protect everyone
4. Professional exits lead to referrals

Exit Scenarios

Scenario 1: Project Complete, No Retainer

```
SITUATION:
Project delivered successfully, client doesn't need ongoing support.

PROCESS:
1. Complete handover (see handover guide)
2. Deliver all documentation
3. Support period ends
4. Final invoice paid
5. Clean close

EXIT PACKAGE:
 All workflow exports
 Complete documentation
 Training videos
 Credential inventory
 Support ends notification

TIMELINE: Immediate after acceptance
```

Scenario 2: Retainer Ending (Mutual)

```
SITUATION:
Client or you decide to end retainer relationship.

PROCESS:
1. Notice given (per contract, typically 30 days)
2. Plan transition
3. Final maintenance tasks
4. Update documentation
5. Knowledge transfer (if new provider)
6. Remove access
7. Final invoice

EXIT PACKAGE:
 Updated workflow exports
 Updated documentation
 Final monthly report
 Outstanding issue resolution
 Transition notes (if new provider)

TIMELINE: Per contract notice period
```

Scenario 3: Client Moving to New Provider

```
SITUATION:
Client is hiring someone else to take over.

PROCESS:
1. Professional response (no drama)
2. Offer transition support
3. Prepare comprehensive handover
4. Optional: Briefing call with new provider
5. Clean exit

EXIT PACKAGE:
 Complete technical documentation
 Architecture explanations
 Known issues/quirks documented
 Contact info for integrations
 Recommendations for new provider

TIMELINE: As needed for smooth transition
```

Scenario 4: Client Going In-House

```
SITUATION:
Client building internal team to manage.

PROCESS:
1. Celebrate their growth!
2. Offer training for internal team
3. Comprehensive documentation
4. Optional: Advisory role
5. Clean handoff

EXIT PACKAGE:
 All technical documentation
 Training sessions (if paid)
 Troubleshooting guides
 Best practices documentation
 Ongoing advisory option

TIMELINE: Based on training needs
```

Scenario 5: Difficult Exit

```
SITUATION:
Relationship problems, disputes, or issues.

PROCESS:
1. Document everything
2. Follow contract terms exactly
3. Professional communication only
4. Complete obligations
5. Clean exit with records

KEY ACTIONS:
 Written communication only
 Preserve all records
 Deliver what's contractually required
 Remove access promptly
 Consider legal review if needed

TIMELINE: Minimum required by contract
```

Exit Process

Step 1: Notice & Planning

```
WHEN EXIT IS INITIATED:

1. ACKNOWLEDGE
   - Respond professionally
   - No emotional reaction
   - Confirm understanding

2. REVIEW CONTRACT
   - Notice period required
   - Exit terms
   - Final billing
   - Obligations

3. PLAN TIMELINE
   Day 1-7: Notice period begins
   Day 8-14: Prepare documentation
   Day 15-21: Knowledge transfer
   Day 22-30: Final handover
   Day 30+: Access removal, final invoice

4. COMMUNICATE PLAN
   "Here's how we'll handle the transition..."
```

Step 2: Documentation Update

```
DOCUMENTATION CHECKLIST:

WORKFLOWS
    - Export all workflows (JSON)
    - Export subworkflows
    - Document recent changes
    - Note any pending updates

TECHNICAL DOCS
    - Update architecture docs
    - Document any undocumented features
    - Update troubleshooting guide
    - Note known issues

CREDENTIALS
    - Complete credential inventory
    - Document rotation schedule
    - Note any pending expirations

PROCESSES
    - Monthly maintenance steps
    - Monitoring procedures
    - Alert handling

CONTACTS
    - Integration support contacts
    - Vendor contacts
    - Emergency contacts
```

Step 3: Knowledge Transfer

```
IF NEW PROVIDER/TEAM:

BRIEFING CALL AGENDA (60 min):
1. Overview of systems (15 min)
2. Walk through workflows (20 min)
3. Common issues & solutions (10 min)
4. Q&A (15 min)

MATERIALS TO SHARE:
- Architecture diagram
- Data flow diagrams
- Credential inventory (not values)
- Documentation package
- Contact information

FOLLOW-UP:
- Offer email Q&A for 2 weeks
- (Billable if significant time)
```

Step 4: Access Removal

```
ACCESS REMOVAL CHECKLIST:

 n8n ACCESS
    - Remove user account
    - Verify removal complete
    - Document removal date

 CLIENT TOOLS
    - CRM access removed
    - Email access removed
    - Calendar access removed
    - All other tools

 COMMUNICATION
    - Slack/Teams removed
    - Shared drives removed
    - PM tool access removed

 CREDENTIALS
    - Recommend client rotate shared secrets
    - Remove any saved passwords
    - Clear local credential stores

VERIFICATION:
- Attempt login to verify no access
- Document all removals
```

Step 5: Final Billing

```
FINAL INVOICE INCLUDES:

 Remaining retainer period (pro-rated if needed)
 Outstanding project work
 Any approved overage
 Exit support (if billable)

TIMING:
- Send within 5 days of exit
- Clear itemization
- Reference contract terms

PAYMENT TERMS:
- Per contract (typically Net 15-30)
- Include all payment methods
```

Step 6: Relationship Close

```
FINAL COMMUNICATION:

Subject: Transition Complete - Thank You

Hi [Name],

The transition is now complete. Here's a summary:

DELIVERED:
 All workflow exports
 Updated documentation
 Credential inventory
 [Other deliverables]

ACCESS REMOVED:
 n8n account
 [Other tools]

FINAL INVOICE:
Sent separately, due [date]

It's been great working with you on [project/systems].
I wish you continued success!

If you ever need automation help in the future,
don't hesitate to reach out.

Best regards,
[Your Name]
```

Exit Deliverables

Technical Package

```
FOLDER STRUCTURE:

[Client Name] - Exit Package/
├── workflows/
│   ├── [workflow1]_v1.0_YYYY-MM-DD.json
│   ├── [workflow2]_v1.0_YYYY-MM-DD.json
│   └── subworkflows/
│       └── [subworkflow].json
├── documentation/
│   ├── overview.md
│   ├── technical-docs.md
│   ├── troubleshooting.md
│   └── faq.md
├── credentials/
│   └── credential-inventory.md (names only, not values)
├── diagrams/
│   ├── architecture.png
│   └── data-flow.png
└── videos/
    └── walkthrough-links.md
```

Exit Report

```
# Exit Report - [Client Name]

## Transition Summary
- Exit initiated: [date]
- Exit completed: [date]
- Reason: [brief, professional]

## Delivered Assets
- [ ] Workflow exports (X workflows)
- [ ] Technical documentation
- [ ] Training materials
- [ ] Credential inventory

## Access Status
| System | Access Removed | Date |
|--------|---------------|------|
| n8n | Yes | [date] |
| [Other] | Yes | [date] |

## Outstanding Items
- [Any remaining items]

## Final Billing
- Invoice #: [number]
- Amount: $[amount]
- Status: [sent/paid]

## Notes
[Any important notes for records]

## Lessons Learned
[Internal notes for future]
```

Special Situations

Client Requests Source Code/IP

```
RESPONSE:

"Per our agreement, all workflow deliverables are
yours once paid. The JSON exports contain the
complete workflow logic.

What I retain are my general templates and patterns
that I use across multiple clients, which wouldn't
be useful to you anyway.

Is there something specific you're looking for that
you don't see in the exports?"

IF DISPUTED:
- Review contract
- Clarify what's included
- Consider legal counsel if significant
```

Client Owes Money

```
BEFORE EXIT:

1. Document all outstanding amounts
2. Send formal invoice/reminder
3. Reference contract payment terms
4. Offer payment plan if helpful

IF UNPAID:
1. Complete minimum contractual obligations
2. Document everything delivered
3. Hold non-essential materials until paid
4. Consider legal options if significant

COMMUNICATION:
"I want to ensure a smooth transition. To proceed,
I'll need the outstanding invoice [$X] cleared.
Once received, I'll complete the full handover."
```

Negative Exit / Disputes

```
PROTECT YOURSELF:

1. DOCUMENTATION
     - Save all communications
     - Document all work done
     - Screenshot key information
     - Keep records organized

2. COMMUNICATION
     - Written only (email)
     - Professional tone always
     - Stick to facts
     - No emotional responses

3. OBLIGATIONS
     - Meet contract requirements exactly
     - Don't over-deliver
     - Don't under-deliver

4. LEGAL
     - Review contract carefully
     - Consider consultation if significant
     - Don't make threats

TEMPLATE:

"I understand we have differing perspectives on
[issue]. Per our agreement dated [date], my
obligations are [specific items].

I have completed/will complete [items] by [date].

Let me know if you have questions about the
contractual terms."
```

Emergency Exit

```
WHEN NECESSARY:
- Safety concerns
- Ethical issues
- Severe non-payment
- Impossible client behavior

PROCESS:
1. Document reason thoroughly
2. Review contract termination clause
3. Provide written notice
4. Meet minimum obligations
5. Remove access immediately
6. Preserve all records

COMMUNICATION:
"After careful consideration, I've decided to
conclude our engagement effective [date].

Per our agreement, [notice terms]. I will:
- Complete [obligations]
- Deliver [materials]
- Remove my access on [date]

I wish you the best going forward."
```

Post-Exit

Internal Archive

```
PROJECT ARCHIVE:

[Client Name] - Archive/
├── contracts/
│   └── [all agreements]
├── invoices/
│   └── [all invoices]
├── communications/
│   └── [key emails]
├── deliverables/
│   └── [what was delivered]
├── lessons-learned.md
└── exit-report.md

RETENTION:
- Contracts: 7 years
- Financial: 7 years
- Technical: 2-3 years
- Communications: 2 years
```

Lessons Learned

```
POST-EXIT REFLECTION:

CLIENT: [Name]
DURATION: [X months]
OUTCOME: [Positive/Neutral/Negative]

WHAT WENT WELL:
1. _____
2. _____
3. _____

WHAT COULD IMPROVE:
1. _____
2. _____
3. _____

RED FLAGS I MISSED:
1. _____

PROCESS IMPROVEMENTS:
1. _____

WILL I WORK WITH THEM AGAIN?
 Yes   Maybe   No

WHY: _____
```

Future Relationship

```
MAINTAIN CONNECTION:

POSITIVE EXIT:
- Connect on LinkedIn
- Add to newsletter
- Check in occasionally
- Be open to referrals
- Available for future work

NEUTRAL EXIT:
- Polite distance
- Professional if contacted
- No active outreach

NEGATIVE EXIT:
- No further contact
- Don't speak negatively
- Learn and move on
```

Exit Checklist Summary

```
COMPLETE EXIT CHECKLIST:

 Notice acknowledged
 Timeline agreed
 Workflows exported
 Documentation updated
 Knowledge transfer complete (if applicable)
 Access removed (all systems)
 Credentials rotated (notify client)
 Final invoice sent
 Payment received
 Exit package delivered
 Confirmation sent
 Internal archive complete
 Lessons learned documented
```

End of Guides. See `processes/` **for SOPs.**

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