Client leaving: website offboarding checklist

When a client moves on, a calm reply and a checklist for a clean, professional exit: accounts in their name, a tested backup, licenses sorted, your access removed and everything confirmed in writing.

Copy, adapt and send. Replace anything in [brackets] with your own details.

THE REPLY

Hi [name], thanks for letting me know, and thank you for working with me. I will make the handover simple. By [date] you will have [the items below]. Your website, domain and email stay exactly as they are throughout. If you have a new designer or host, introduce us and I will work with them directly.

ACCOUNTS AND OWNERSHIP

- [ ] Registrar, hosting, DNS and email accounts confirmed in the client's name.
- [ ] Anything held in your accounts (domain, hosting) moved to the client or new host.
- [ ] Analytics, Tag Manager, Search Console: client is owner; your access removed after.
- [ ] Licenses: client's own keys entered, or yours transferred or removed, as agreed.
- [ ] Renewals list: product, cost, cycle, next date, account email, sites affected.

FILES AND DATA

- [ ] A full, recent backup (files and database), tested to open, sent by [method].
- [ ] Design source files and assets the client has paid for.
- [ ] Handoff document: accounts, settings, quirks, update notes.
- [ ] Form entries or exports the client needs, sent securely.

REMOVE YOUR ACCESS

- [ ] Your WordPress users, SSH keys and application passwords removed or handed over.
- [ ] Site removed from your monitoring, backup schedule and update tools.
- [ ] Shared passwords you knew changed by the client, or flagged to change.
- [ ] Any copies you keep: only what your agreement allows, deleted when it says.

CLOSE IT OUT

- [ ] Final invoice for work done and prepaid fees refunded as the agreement says.
- [ ] Money owed is handled separately: never delay client-owned accounts over it.
- [ ] Written confirmation of what was handed over, and the date your support ends.
- [ ] Give them an owner's manual: /design-field-kit/owner-manual/ on webdesignsurvivalist.com.
- [ ] Ask for feedback. Wish them well. Leave the door open.