STRETCHLEARN · WORKBOOK

Offboarding & Re-Engagement — Workbook

This workbook turns the course into a closing machine you run on every finished project. Complete each section as you finish the matching module, and by the end you will have an offboarding checklist and sign-off, a handover and access-transfer package, a testimonial and case-study system, a specific referral ask, and a 30-90-180 day re-engagement and win-back plan. Use the templates to track every client through offboarding, capture proof while it is fresh, and reactivate past clients on a schedule so the easiest sales in your business stop slipping away.

Why the Ending Is Worth More Than the Win

Map your offboarding sequence, estimate the lifetime value you are leaving on the table, and find the gaps in how your projects currently end.

Worksheet: Map Your Offboarding Sequence

Write out every step from the moment work is complete to the moment you next reach out to win the client back. For each step, note what happens, who triggers it, and when it fires relative to final delivery. Use the Offboarding Tracker template to turn this into a reusable checklist.

Final review and sign-off: how you confirm acceptance against the definition of done

Final invoice issued and paid: what you release only on settlement

Handover package delivered: due how long after final payment

Offboarding call or message: what you cover and celebrate

Feedback and testimonial captured: when you ask, relative to delivery

Referral and introduction ask: when and how, separate from the testimonial

Next-step offer made: retainer, care package, next phase, or expansion

Re-engagement scheduled: the 30, 90, and 180 day touch dates

Exercise: Diagnose How Your Last Project Ended

Think back to your most recent completed project. Walk through what actually happened after you delivered, and find the value you left on the table. Be honest about the fade-out.

- Did the project end with an explicit written sign-off, or did it just trail off?
- Did you ask for a testimonial and a referral at the peak, and if not, why not?

• Did you offer a clear next step (retainer, next phase, expansion), or say goodbye?

• Have you contacted that client since delivery, and is the next touch scheduled anywhere?

Worksheet: Estimate Your Client Lifetime Value

Put rough numbers on what one happy client is really worth, so the close earns its priority. Even illustrative figures reveal the gap between a one-time fee and a long-term relationship.

Average project value (your typical engagement fee)

Estimated repeat projects from a happy client over a few years

Estimated referrals per delighted client and their value

Total estimated lifetime value (first project + repeats + referral value)

Rough cost to acquire that client (hours of pitching and outreach)

The multiple: lifetime value divided by acquisition cost

Checklist: Ending-Mindset Readiness Checklist

[ ] I have a written offboarding sequence from final delivery to win-back
[ ] Each step has an owner and a trigger relative to final delivery
[ ] I have designed against the fade-out and the never-ending project
[ ] I can state the lifetime value of a typical client, not just the project fee
[ ] I treat the close as my highest-leverage sales and marketing moment

Closing the Project Professionally

Build the offboarding checklist, the sign-off, the handover package, and the final-payment process that end the work cleanly and get you paid.

Worksheet: Write Your Final Sign-Off Message

Draft the message that converts an open engagement into a completed, accepted, invoiceable one. Tie acceptance to the final invoice and preview the handover so the client feels they are receiving something.

Restatement that all deliverables are complete against the contract or statement of work

Acceptance criteria you are confirming were met

How open items are handled (resolved, parked as new work, or out of scope)

The one-line request for written acceptance

How acceptance unlocks the final invoice and handover package

Your rule for the silent client (deemed-accepted deadline)

Exercise: Build Your Handover Package

Assemble the handover you will deliver on every project. Hand over the work the way you would want to receive it: organized, owned, and explained. The Handover & Access Checklist tab of the Offboarding Tracker gives you the structure.

• Which final and source files will you deliver, and how will you name and organize them?

• What accounts, logins, or ownership must transfer to the client, and how will you avoid shared passwords?

• What will your one-page how-to-use guide or short Loom walkthrough cover?

• What recommendations and next steps will you include to keep the result healthy?

Worksheet: Final-Payment and Access-Transfer Plan

Decide how you secure the last payment with leverage and a system, and how you transfer ownership cleanly. Tie the full handover and access to settlement, as agreed in your contract.

What you release on review versus what you release only on final payment

Final invoice timing and the due date from your terms

Invoicing tool that sends automatic reminders (FreshBooks, Wave, QuickBooks, Stripe, HoneyBook, Bonsai)

Accounts and ownership to transfer (domain, hosting, ad account, source files, licenses)

Your late-payment reminder and escalation steps

How you will close on a sincere human note (call or message)

Checklist: Clean-Close Checklist

[ ] I get explicit written acceptance against the definition of done
[ ] I issue the final invoice immediately and release access on payment
[ ] I deliver an organized handover package with files, access, and a how-to guide
[ ] I transfer account ownership to the client and leave no shared passwords
[ ] I hold a closing call or message that celebrates the result and thanks the client

Capturing Proof and Referrals at the Peak

Build the testimonial system, the case study, and the referral ask that compound one delighted client into many future sales.

Worksheet: Design Your Testimonial Request

Build the testimonial ask you send at the emotional peak. Send specific prompt questions or offer to draft from the client's words. Add the review links that matter in your field. Use the Proof & Referral Tracker to log each request.

When you will ask (right after a result they love, or at the warm close)

Your before-and-after prompt questions (problem, worry, experience, result, recommendation)

Whether you will offer to draft the testimonial for approval

Format you will request (written with photo and company, or video)

Review platform and direct link (Google Business Profile, Clutch, LinkedIn, marketplace)

One sentence of guidance you will send to make the review effortless

Exercise: Outline a Case Study From This Project

Turn your most recent strong project into a problem-approach-result case study while the details are fresh. Capture metrics wherever possible and get permission to publish and to name the client.

- What was the client's problem or goal, stated in their terms?
- What was your approach, and which key decisions mattered most?
- What was the result, with concrete numbers or a clear qualitative outcome?
- What client quote captures the win, and what may you name versus keep anonymous?

Worksheet: Write Your Specific Referral Ask

Draft a referral request that does the thinking for the client. Ask separately from the testimonial, describe exactly who you want, and make the introduction a single forward.

How you will anchor on the result they are happy with

A precise description of your ideal next client (industry, size, situation)

The effortless path you offer (a blurb to forward, or a one-line intro email)

How you lower the stakes (zero pressure, even a name helps)

Any referral incentive you will offer (discount, gift, referral fee) and whether it fits your field

Where you will log who was referred and any follow-up

Checklist: Proof and Referral Checklist

[ ] I ask for testimonials at the peak, not months later
[ ] I send specific prompt questions or offer to draft the testimonial
[ ] I capture a problem-approach-result case study with numbers and permission
[ ] I ask for referrals separately and describe the exact client I want
[ ] I make every introduction as easy as forwarding one email

Re-Engagement and the Win-Back Engine

Build the re-engagement calendar, the win-back sequence, and the next-step offers that reactivate past clients and convert finished projects into ongoing relationships.

Worksheet: Build Your Re-Engagement Calendar

Schedule the value-first touchpoints that keep you top of mind after the project ends. Lead with value, never with asking for work. Load these into the Re-Engagement & Win-Back Tracker so each touch actually fires.

Day 30 touch: a no-pitch check-in on how the work is performing

Day 90 touch: a value touch (idea, resource, or quick win you noticed)

Day 180 touch: a light re-engagement opening the door to a next project

Ongoing quarterly touch: a low-effort, high-value note so a year never passes in silence

Trigger-based touches you will watch for (their news, project anniversary, a fitting change)

Tool that will run the schedule (HubSpot free CRM, Notion, Airtable, calendar reminders, newsletter)

Exercise: Run a Win-Back on Your Past-Client List

Go through your past clients and plan a personalized re-engagement for those who went quiet. Personalization is what makes win-back land, so reference the specific work and a real detail of their business.

• Which past clients delivered great results and would you happily work with again?

• For each, what real detail of their work or business will you reference to avoid sounding like a mass blast?

• What relevant reason to reach out fits each one (new service, opportunity, fresh idea, check-up)?

• What specific, low-pressure offer will you make (audit, strategy call, defined project)?

Worksheet: Design Your Next-Step Offers

Decide the offers you will make at the close, while trust is at its peak, to convert a finished project into an ongoing relationship. Frame retainers as continuing the result, not starting something new.

Retainer or maintenance plan: what ongoing support, updates, or management you offer monthly

Care or check-up package: a smaller paid follow-up to keep the work healthy

The next logical phase: the natural follow-on project this engagement reveals

Expansion or upsell: a related service the client now needs

Standing invitation: your warm statement and how to reach you when the time comes

Your retainer pitch in one line (here is what we achieved, here is how we keep it growing)

Checklist: Re-Engagement and Repeat-Work Checklist

[ ] I have a 30-90-180 day re-engagement calendar with scheduled touches
[ ] Every touch leads with value, not with asking for work
[ ] I have a personalized win-back sequence for dormant clients
[ ] I offer a clear next step at the close while trust is highest
[ ] I convert suitable project clients into retainers for predictable revenue
[ ] No past client of mine goes fully cold without a planned touch

Your Action Plan

1. Map your offboarding sequence from final delivery to win-back with an owner and trigger for every step
2. Estimate the lifetime value of a typical client so the close earns its priority
3. Write a final sign-off message that ties written acceptance to the final invoice
4. Build a reusable handover package with organized files, access transfer, and a how-to guide
5. Secure final payment with leverage and an invoicing tool that sends automatic reminders
6. Ask for a specific testimonial at the peak using before-and-after prompt questions
7. Capture a problem-approach-result case study with numbers and permission to publish
8. Make a specific, effortless referral ask separate from the testimonial
9. Offer a clear next step at the close: a retainer, care package, next phase, or expansion
10. Load every past client into a 30-90-180 day re-engagement calendar and run a win-back on dormant ones