# RETAINER CLIENT OFFBOARDING ROUTING FORM

**Customer Name** | **Date**

**Business Name** | **Service**

## ACCOUNT MANAGER: ______________________

| | INITIAL | DATE |
|---|---|---|
| 1. After the client has notified you that they want to discontinue services, steps have been taken to save the account | | |
| 2. If unsuccessful, elevated to Executive level to assist in salvaging client | | |
| 3. Received notification from Finance (Ernesto or Dalen) to continue offboarding steps | | |
| 4. CMO sends an email to request an offboarding meeting | | |
| 5. Inform Div 1 and copy AGM CMO (Jorge) and CAO (Ernesto)by email to start the offboarding process. The reason why the client let us go and any other vital data. Also add this information in the comments section of the CRM. | | |
| 6. If desired by the client, have an offboarding call with the client. (Go over any projects, ads, or campaigns that we are in the middle of, and agree on how they will be taking over. Will we shut ads off? Will they take over the Ads management?) | | |
| 7. If an offboarding meeting was done, email the client the notes from the offboarding call so we have documentation | | |
| 8. Gather all the creatives and that we have created for the client, and put them on an Egnyte link if they are not there yet. | | |
| 8a. (AMZ) Send client all non-proprietary files (change logs, stats, etc) | | |
| 9 Email Egnyte link and password Google sheet to client | | |

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## RETENTION SPECIALIST

| | INITIAL | DATE |
|---|---|---|
| 10 Verify all creatives and passwords and (AMZ) non-proprietary files have been sent to the client | | |
| 11. Verify all staff have been removed from all client accounts and they have been removed from our Business Manager | | |
| 12. Remove account from Health Chart | | |

## PRODUCTION MANAGER

| | INITIAL | DATE |
|---|---|---|
| 13. Announce to the Acc Manager and any other staff that needs to know (Creative Dept, Exec, Sales Team, Etc) that we will no longer be doing business with the client. Also, get data from the Account manager, document it, and file the info in the Client's physical file. Make sure you announce it. | | |
| 14. Get it in writing that the Client wants to stop our services, upload to CRM and print and file in client folder | | |
| 15. Document why we stopped doing business with them and file in Client folder and CRM and tag as important | | |
| 16. Move from Active to Central Files in CRM | | |
| 17. Move to "old clients" folder in Egnyte. | | |
| 18. Archive project in TimeDoctor | | |
| 19. Remove from Ninja Lab | | |
| 20. Delete graphs and delete from stats group in CRM | | |

*1.10.2023*

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21. Delete graphs and delete from stats group in CRM

22. Confirm with Retention Specialist/Creative Department:

A.- Email all creatives to the client
B.- Make sure that no one works on the account anymore, unless we need to finish the last month they paid.
C.- Email the client the google sheet with all of the passwords
D.- Removed from Health Chart

## FINANCE STAFF — INITIAL — DATE

23. Delete from lined up income google sheet

24. Update AGM's Health Chart Closed Accounts

25. If refund was sent, email client to inform them of the refund data ( amount, invoice number and account number.)

Turn in this checklist when complete to Ollie by leaving it in his comm box.

NOTE: You need to continue with the tasks list in the CRM until completion when you have completed that task list also prints out and turns it to the Ollie comm box and includes the customer's name.

I confirm that the above tasks have been fully completed and the customer has successfully been onboarding and is now rolling.

Signature Date

Approved by Production Manager Signature Date

*1.10.2023*