

CLIENT OFFBOARDING & REFERRAL SYSTEM

The international system for closing projects, earning honest feedback and generating referrals



CLOSE CLEANLY. HAND OVER FULLY. STAY REFERABLE.

An operating system for freelancers, studios and small agencies. Not legal or marketing advice.



How to use this system

POSITIONING

This product uses an international process and requires local configuration. It never assumes that privacy, commercial messages, reviews, testimonials, incentives, data retention or contract terms work the same way in every country.

The C.L.O.S.E. method

Stage	Meaning	Outcome
C	Confirm completion and criteria	Defensible closure
L	Log handover, access and decisions	Clean record
O	Obtain honest feedback	Real improvement
S	Sustain the relationship with permission	Respectful contact
E	Earn relevant referrals	Credible growth

Essential boundaries

- It does not replace legal, tax, privacy, contract or marketing advice.
- It does not guarantee reviews, referrals, conversions, reputation, payment or dispute-free closure.
- It does not permit fake reviews, manipulated testimonials, hidden incentives, contact without permission or spam.
- Agreement, platform, country, client type and channel must be checked locally.

90-minute Quick Start

- 1 Open the workbook and complete SETUP and LOCAL PROFILE.
- 2 Enter the client, project, agreement, owner and key dates.
- 3 Create the Definition of Done and deliverables register.
- 4 Run the Completion Gate and assign open items.
- 5 Build the Handover Index and map access.
- 6 Define support, retention and deletion actions.
- 7 Prepare separate feedback, review and testimonial-permission steps.
- 8 Define the ideal referral profile and permission-based introduction rule.

FIRST RULE

Close the promised value first. Ask for feedback, a review or a referral only afterwards.

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File architecture

Folder	Contents	Rule
00_CONTROL	dashboard, local profile, reviews	current version
01_CONTRACT	agreement, scope, change requests	restricted access
02_DELIVERABLES	finals, source assets, evidence	dated versions
03_HANDOVER	index, instructions, receipts	final package
04_ACCESS_DATA	accounts, roles, retention	no plain-text passwords
05_FINANCE	invoices, payments, balance	reconcile
06_FEEDBACK	survey, issues, improvements	separate from marketing
07_REVIEWS_REFERRALS	permissions, requests, leads	permission and disclosure

FILE NAMES

YYYY-MM-DD_CLIENT_PROJECT_CATEGORY_DESCRIPTION_v01.ext. Keep sensitive data and passwords out of filenames.

PART I | PLAYBOOKS

From delivery to referral

Fourteen international procedures for closing with evidence, permission and respect.

