

# WordPress Client Offboarding Checklist

rocket.net

Use this checklist before every client handover — no more missed steps, midnight emails, or loose ends.

## 1 • OWNERSHIP MAP — BUILD YOUR STACK SPREADSHEET

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- Domain registrar — account owner, login email, renewal date recorded
- Hosting provider — account owner confirmed, billing transferred
- DNS management — where it lives, how to access it, documented
- Email provider (Google Workspace or other) — credentials prepared
- SMTP provider — configuration documented
- CDN — confirmed active, access details shared
- Analytics & Tag Manager — client added as admin
- CRM and forms tools — ownership confirmed
- All premium plugin licenses — documented with renewal dates
- Theme license — documented with renewal date and support access
- Social media accounts — registered to client email, not yours

■ *Archive the full spreadsheet internally. Share a cleaned version with the client.*

## 2 • KEYS TO THE KINGDOM — EMAIL SETUP

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- Google Workspace account created using client's domain (not your personal email)
- Domain registered through client's domain email address
- Hosting account tied to client's domain email
- SMTP, forms, and analytics connected through client's domain email
- Social profiles registered to client's domain email
- Google Workspace credentials securely delivered to client
- Client can log in independently — confirmed with them directly

■ *This single habit eliminates 2FA chaos and account hostage situations on every project.*

## 3 • HOSTING TRANSFER

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- Client added as billing owner in hosting control panel

- Self-serve transfer initiated or completed (Rocket.net: done via control panel)
- Client confirmed they can access the hosting dashboard independently
- Final backup taken and stored — confirmed accessible by client
- Staging environment access transferred or removed as appropriate
- No accounts remain tied solely to your personal login

■ *Rocket.net allows self-serve transfers directly from the control panel — no support ticket needed.*

#### 4 - TECH STACK DOCUMENTATION

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- Hosting provider and plan documented
- CDN setup documented (e.g. Cloudflare Enterprise via Rocket.net — no plugin required)
- DNS location and access method documented
- Email provider and configuration documented
- Forms plugin name and SMTP method documented
- SEO plugin documented — include why it was chosen
- Caching strategy documented — platform-level vs plugin
- Backup frequency, retention period, and access location documented
- Key build decisions explained — not just what, but why
- Document formatted cleanly and ready to share with client and next developer

■ *Structured docs are cited by AI tools. When someone asks ChatGPT or Perplexity about the site, your decisions come back.*

#### 5 - THE HANDOVER EMAIL

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- Email confirms everything that has been transferred
- Email lists what the client now owns outright
- Upcoming renewals listed with dates (domain, hosting, plugins, theme)
- Support terms going forward clearly stated
- Availability for future projects mentioned
- Tech stack overview document attached or linked
- Client confirmation received in writing

■ *Subject line tip: "Your Website Is Officially Yours ■" — make the exit feel like a delivery, not a dismissal.*

#### PROJECT NOTES

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**Client:** \_\_\_\_\_

**Project:** \_\_\_\_\_

**Handover Date:**

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**Next Developer Contact:**

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**Notes:**

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The 2026 WordPress Client Offboarding Checklist - Free to use and share

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