



Ensuring an Excellent Client Experience: Project Completion Checklist

Project Files Handover & Next Steps

- Create a shared folder with all project files with a table of contents.
- Align with the client on their action plan going forward.
- Prepare a one-page checklist for lead client: key actions & milestones.

Maintaining Relationships

- At project close, calendar a follow-up 3-6 months later.
- Connect on LinkedIn with each client if not already done.
- Ask the client to be a guest on your podcast or featured on your blog.
- Ghostwrite an article about the project your client lead could publish.
- Prepare slides your client can use to present the work to colleagues.
- Add select clients to your holiday card list.

Questions to Elicit Testimonials

- What went well in the project?
- What was of the most value to you?
- If you were talking to a colleague who was thinking about using us, what would you tell them and why?
- Do you mind if I share your words as a testimonial?

Questions to Referral Introductions

- I know you've met a lot of people in your line of work. Who have you found most intriguing?
- Do you know anyone who might find our services helpful that you would be willing to introduce me to?

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