

### Client Engagement Close out Checklist

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Client	Service scope and expected timeframe
{client}	{short description + reference to WO/contract if available.}

Completed by  
Title  
Date

*This checklist should be completed and saved as a versioned pdf after project finalisation.*

**1 GENERAL CLIENT ENGAGEMENT INFORMATION**

Item	Information
Client contact	
Engagement Start	
Engagement end	
TTC Team	

**2 ENGAGEMENT CLOSE-OUT**

Item	Yes / Date/ Evaluation / Comment
Materials delivered to client	
Project folder archived	
Project status / success rating	
What can be done better in future engagements	
Objectives achieved	
Possible new engagements – follow-up with client	

**3 DEBRIFEFING**

Item	Evaluation / Comment
<b>Budget</b>	
Time spent vs allocated hours?	
Financial outcome	
<b>Internal questions</b>	
How did the division of labour work - was it clear? Did it go to plan?	
Any challenges and obstacles?	
What are we satisfied with in the project?	

What improvement opportunities can we identify?	
Any follow-up projects? If not relevant, why?	
Tools, processes, and methodologies used that needs to be updated.	
General learnings?	
<b>External questions</b>	
General feedback from client?	
Client satisfied / not satisfied?	
Interest for further engagements?	
Communication in the engagement	