

## GENERAL – How To - Off Board a Monthly Digital Marketing Customer

**Purpose of this SQ How To:** To ensure all the relevant colleagues know when and why a customer has left us and what their responsibilities are in relation to 'Offboarding' the customer

**Owner:** Account Manager

**Applicable to:** Account Manager, Admin Team, Leads, Project Team

**Timescales:** 30 days' notice

### Introduction

The purpose of the Off Boarding How To is to ensure that the **Account Manager** can cancel a customer officially in Accelo and notify all relevant parties.

### 30 days notice is received by the Account Manager

If a customer wishes to cancel their contract, they must give notice to their **Account Manager** according to the terms of their contract.

If the customer does not have a contract, the standard notice period of cancellation is 30 days.

#### Cancellation is accepted by SQ Digital

**Account Manager** should agree with customer a last report date and last invoice date.

The **Account Manager** should create a note in Accelo and attach to the customer, copying in members of the Team for that customer (this can be found in the Monthly Contract) & also a member of the Admin Team. This template should include:

Last Invoice Date:  
 Last Report Date:  
 All work to be finished (DATE)

The monthly contract should then be given an 'expiry date' in Accelo by the **Project Team**.

Once this expiry is approved and received by the **Project Team**, they will:

Task	Done
Check If there is any outstanding content to be completed	

Cancel Copify if Applicable	
Check If there is a final planning meeting / session to be held for the customer	
Check If there are any special circumstances for their final 30 days work with the Account Manager	
Check that the Monthly Contract has been expired and their last interval has / will fire as required	
If applicable – Generate any unique tasks for reviewing the campaign	
Ensure the Google Ad spend has been paused / left and access granted to someone else	
Check our card is not connected to any accounts	
Complete any required GDPR compliant data deletion (EG perhaps data base, mailing list, assets etc)	

Once this expiry is approved and received by the **Admin Team**, they will:

Task	Done
Ensure the repeating invoice has been deleted from Xero (after the last invoice)	
Contact the Customer to ensure they understand their last invoice date (S/O cancelled if applicable)	
Send out feedback survey (customer promoted cancellations only)	
Make feedback phone call (Platinum only)	

### Notifying a Customer of cancelled contract

There are a number of circumstances when SQ digital may orchestrate the cancellation of a contract, this may be:

- They are not the right client
- They are not paying the minimum threshold and do not wish to be upgraded

In this circumstance the **Account Manager** should look at the contract and give notice accordingly to the terms of that contract.

The process is then the same from **Cancellation is accepted by SQ Digital**