

## Client Graduation:

Make sure you understand why.

Review all previous complaints.

Document how and what we learned from this experience.

Review the client's expectations.

Check in to see how client is handling everything.

Check the contract with the Account Manager.

Check if supplies need to be picked up, and schedule pickup.

Account Manager is to make sure client is paid up.

Respect the client's decision: make them feel safe and comfortable to move on.

Ask how we can make their transition smooth, or if there is any information they need.

Leave with grace.

Send a thank you note. Always be appreciative for the opportunity.

Conduct an internal post-mortem meeting.



*Don't Forget*

***Your most unhappy customers are  
your greatest source of learning.***