

Offboarding policy

Ideas + Outcomes Limited

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Introduction

This policy outlines the offboarding process for social media retained clients at Ideas + Outcomes Limited. It specifies the procedures for the handover of creative assets, the availability of additional support, and the associated fees. Our aim is to ensure a smooth transition for clients choosing to conclude their retainer agreements with us.

Offboarding process

Offboarding involves the formal process of transitioning a client's social media accounts and related assets back to the client or to a new service provider at the conclusion of their retainer agreement once notice has been served. This service is entirely optional.

Included in offboarding

1. **Final Report:** A comprehensive report detailing the performance metrics and outcomes achieved during the tenure of the service.
2. **Account Status Summary:** An overview of the current status of all social media accounts managed under the retainer.

Not included in offboarding (Chargeable services)

1. **Creative Assets and Design Templates:** The handover of all creative assets (including graphics, videos, and multimedia content) and design templates produced by Ideas + Outcomes Limited during the retainer period is not automatically included in the offboarding process. These can be provided upon request and are subject to additional charges.
2. **Account Access and Additional Support:** Providing continued access to social media accounts, as well as the creation of handover or "how-to" guides for the management of these accounts, are not covered under the standard offboarding process. These services are available upon request and will incur additional fees.
3. **Training of the In-House Team:** Training services for the in-house team to manage and run the social media accounts effectively after the offboarding are not included in the standard offboarding package. This training is available upon request and is chargeable.

Fees

The minimum fee for the offboarding process is set at 35% of the regular monthly retainer, subject to a minimum charge of £300. This fee covers the basic offboarding services as outlined above. Should the client require additional offboarding services, including but not limited to the handover of creative assets, design templates, provision of account access, "how-to" guides, or training for the in-house team, the fee may increase accordingly. The specific fees for these additional services will be communicated and agreed upon prior to the commencement of the offboarding process.

Payment terms

Fees for offboarding services are payable upon receipt of invoice. Handover of assets and completion of the offboarding process will not be initiated until payment is made. Failure to adhere to these payment terms may result in a delay or suspension of the offboarding process.

If offboarding service is not utilised

Should a client choose not to utilise our offboarding service, at the end of the contract, Ideas + Outcomes Limited will:

- Remove our access from your social media accounts.
- Delete all reports and creative assets related to your account from our servers.

This ensures that your information remains secure and that you have full control over your accounts post-contract.

Conclusion

Ideas + Outcomes Limited is committed to ensuring a seamless transition for our clients. We understand the importance of a smooth offboarding experience and are here to support our clients through every step of the process. Should you have any questions or require further clarification on our offboarding policy, please do not hesitate to contact us.