

SOP – Proper Project Completion & Client Handover

? Objective

Ensure every project is **fully completed, verified, communicated, and closed** in a professional and consistent manner that:

- Avoids confusion
 - Prevents missed steps
 - Maximizes client satisfaction
 - Increases chances of **5-star reviews and referrals**
-

? Scope

Applies to:

- All website development projects
 - Fiverr and off-platform clients
 - New builds, redesigns, and website transfers
-

?? Core Rules (Non-Negotiable)

- Never assume a project is complete without verification
 - Never disappear after website transfer
 - Never rush the client for feedback
 - Completion = **Technical + Communication + Client Confirmation**
-

? Step-by-Step Project Completion Process

? Step 1: Final Website Transfer (If Applicable)

- Transfer the website to the **client's live domain**
- Ensure:
 - Correct domain is live
 - No subdomain URLs remain
 - SSL is active and working

☐ Do **not** proceed until transfer is successful.

☐ Follow SOP: **How to Transfer a Website**

? Step 2: Verify Website in Incognito Mode (Mandatory)

Immediately after transfer:

- Open the website in **Incognito / Private mode**
- Check:
 - Homepage loads correctly
 - All pages open
 - Forms work properly
 - Images load
 - Layout looks correct

☐ Do NOT rely on logged-in or cached views.

☐ Follow SOP: **How to Check a Website After Transfer**

? Step 3: Update Project Status & Tags

In ClickUp / CRM:

- Update project status:
Waiting for Transfer → Waiting for Delivery
- Apply tag: Transferred
- Add activity note: Website transferred.

☐ Delayed updates = tracking failure.

The screenshot shows a ClickUp task page for 'davonfin (MID 5) (United States)'. The task is assigned to Muhammad Abdullah. The status is 'WAITING FOR DELIVERY' and the tag is 'transferred'. The activity log shows a status change from 'Waiting For Transfer' to 'Waiting For Delivery' and a tag addition of 'transferred'. The task includes two links: a Google Drive folder link and a login link for 'drinbyday.com'.

Website Development / Fiverr - Website Development Jhanzaib + | Created 14 Dec | Share ...

davonfin (MID 5) (United States)

Status: **WAITING FOR DELIVERY** ✓

Assignees: Muhammad Abdullah

Dates: 14/12 → Yesterday, 2:32

Priority: Normal

Tags: **transferred**

Track time: Start

<https://drive.google.com/drive/u/0/folders/1nXan6LIS9fFY9iyexP7hdVg7pWBP1k3C>

<https://drinbyday.com/>

Login

Custom Fields

Add subtask

Relate items or add dependencies

Create checklist

Client's Fiver Username

Activity

Saifullah Dec 23 at 12:04

Client said he did not want to add extra page and he did not have any changes. Follow up already done regarding the transfer.

- subhan khan changed status from **Waiting For Transfer** to **Waiting For Delivery** Yesterday at 23:52
- subhan khan added tag transferred Yesterday at 23:53

Saifullah 9:33

All done. Waiting for client response on delivery message.

Write a comment...

? Step 4: Internal Confirmation (Team Alignment)

Before contacting the client, confirm internally:

- No pending tasks
- No missing assets
- No unresolved client requests

Only proceed after internal confirmation.

? Step 5: Client Confirmation Message (Mandatory)

Send the saved Fiverr quick message:

Quick Message Name:

Website Transfer Complete

Message:

```
The website has been successfully transferred to your domain.  
Please have a look and let me know if everything is good to go.  
  
Here is the link: {CLIENT URL}
```

Tone must be clear, calm, and professional.



Me

24 Dec, 19:25

The website has been successfully transferred to your domain please have a look and let me know if everything is good to go thanks :)

Here is the link: <https://eyelight.dk/>

? Step 6: Handle Final Changes (If Any)

- If the client requests changes:
 - Follow the **Changes SOP**
 - Do NOT mix delivery and revision steps
 - Track all changes properly
 - If no changes are requested → proceed.
-

? Step 7: Encourage Feedback & Review (Polite & Natural)

Once the client confirms satisfaction:

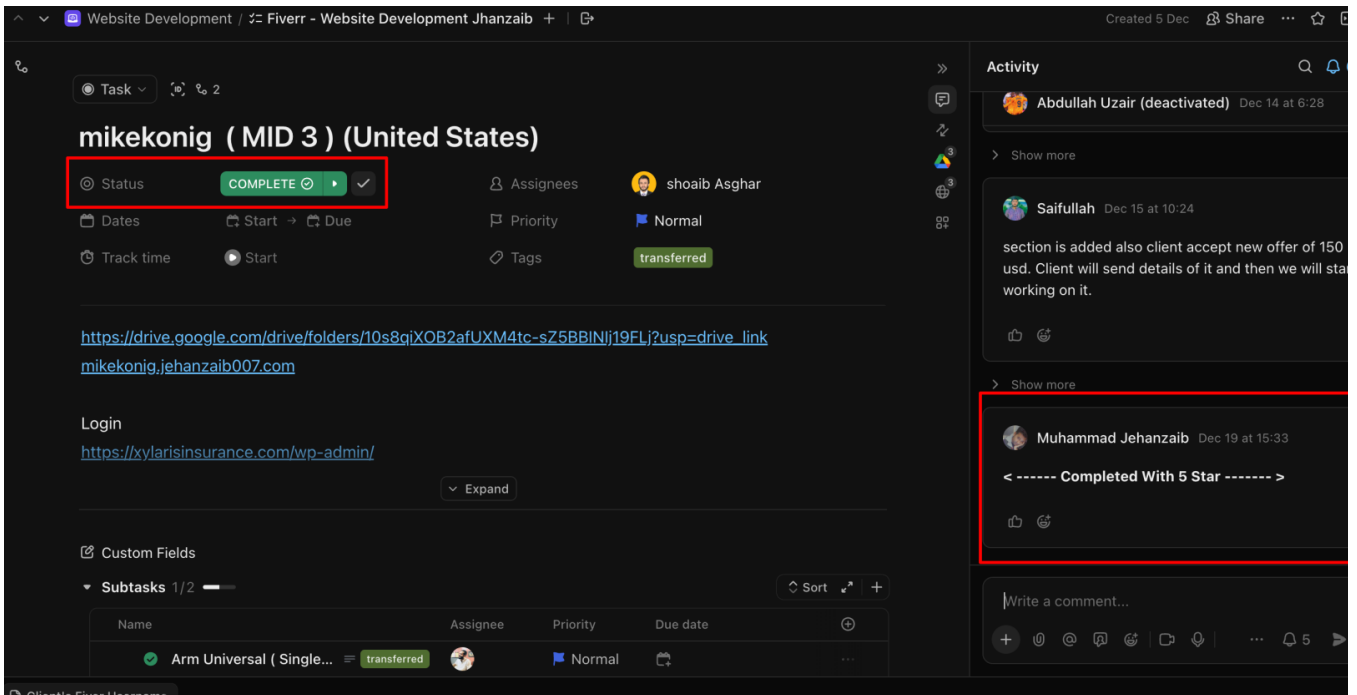
- Deliver the order
- Follow the closing step
- Politely encourage feedback
- Do NOT pressure the client

(Use the approved delivery + review request message)

? Step 8: Close the Project Properly

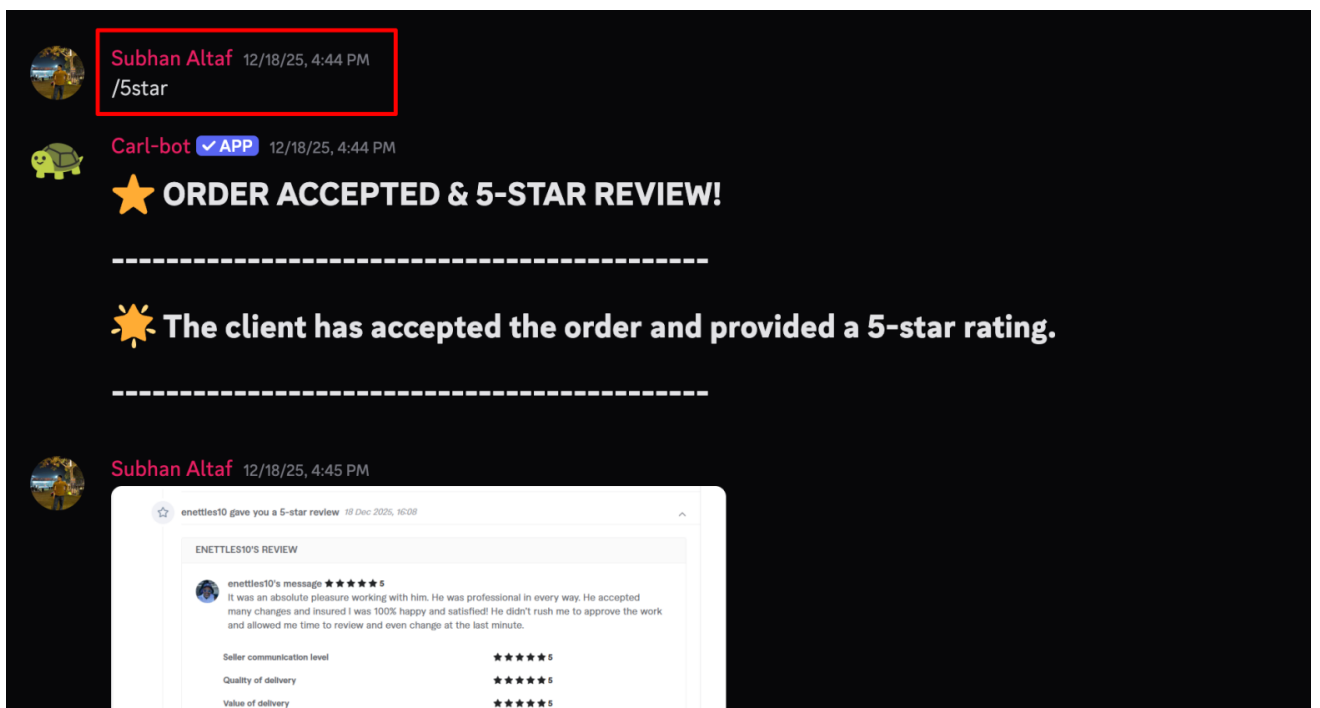
? Case 1: Client Leaves a Review

- Update ClickUp status:
- Delivered → Completed
- Add activity note: <--- Completed With 5 Star --->



On Discord:

- Use command: /5star (or relevant rating command: /4.7, /4.3, etc.)
- Also add the screenshot of the review as well for future refrecnes.



In CRM:

- Move client to **Past Clients**
- Add tag: Repeat Buyer

The screenshot shows a CRM profile for a client named 'toya97'. The profile is divided into two main sections: a left sidebar with client details and a right main area with labels and notes.

Client Details (Left Sidebar):

- Category:** A dropdown menu currently set to 'Past Clients'.
- Username:** A text input field containing 'toya97' with an edit icon.
- Website:** A text input field containing 'https://handzonhomes.com/' with an edit icon.
- Last Messaged:** A date input field with a calendar icon, an 'Update' button, and a trash icon.
- Next Follow-up:** A date input field with a calendar icon, an 'Update' button, and a trash icon.

Main Area (Right):

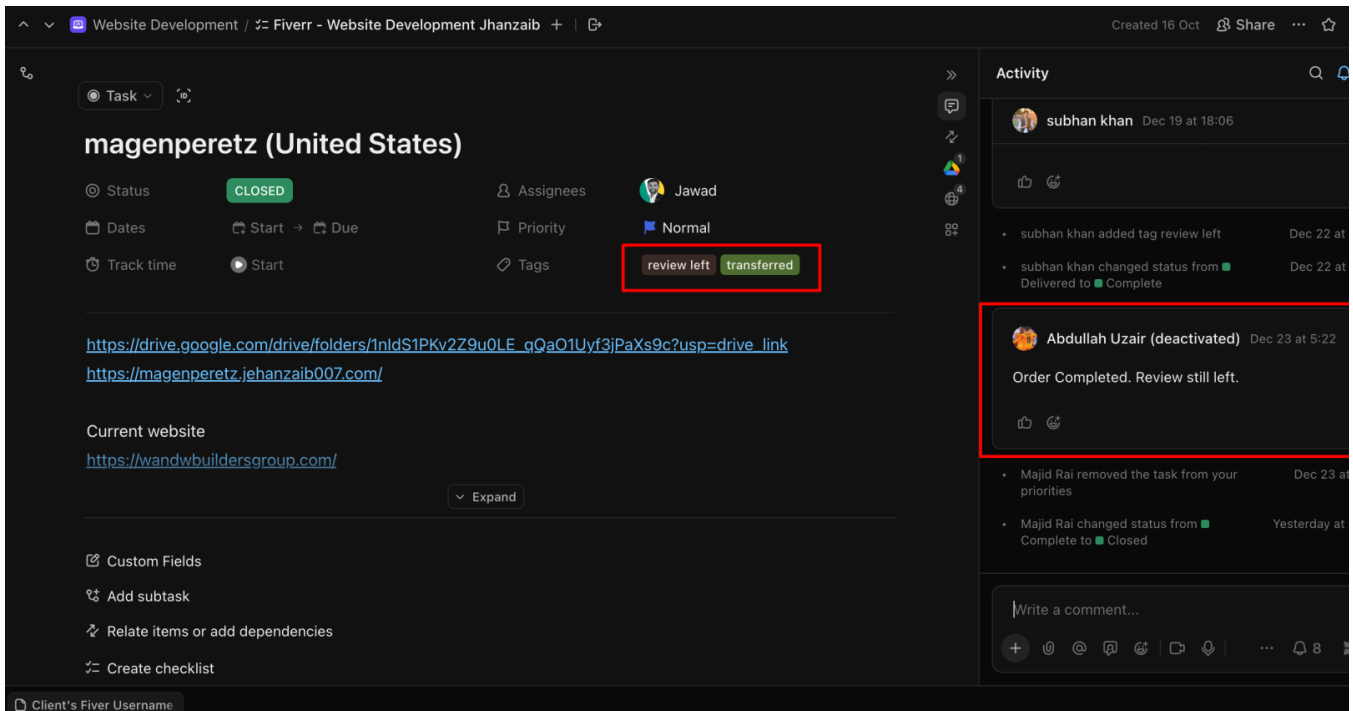
- Labels:** A horizontal list of tags. 'Opportunity' is a pink tag, and 'Repeat Buyer' is a dark blue tag. A red box highlights the 'Repeat Buyer' tag. To the right is a search input field with a dropdown arrow.
- Notes:** A large text area with the placeholder text 'Add notes here...'. An 'Update Notes' button is visible at the bottom right of this section.

At the bottom right of the entire profile view, there is a 'Close' button.

?? Case 2: Client Does NOT Leave a Review

- Update ClickUp status:
 - Delivered → Completed
- Add tag: Review Left

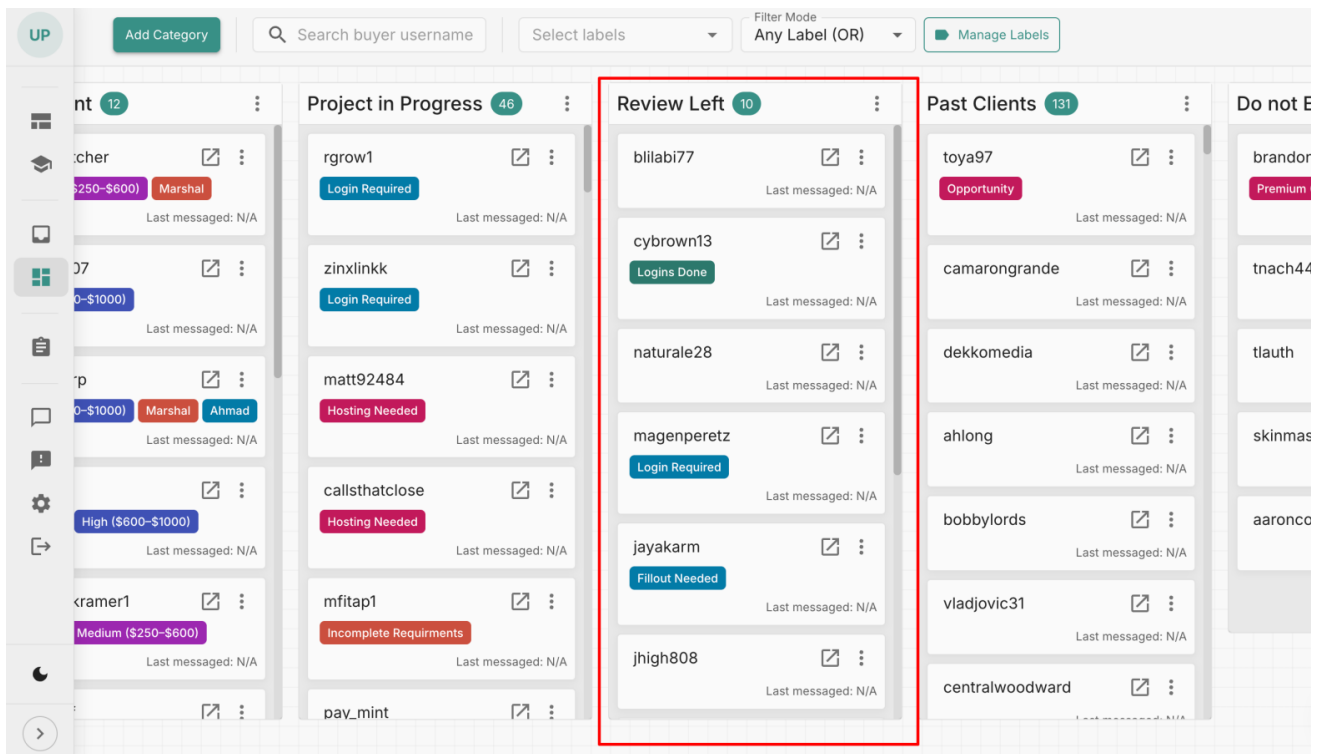
- Add activity note: <— Completed by Client (Review Left) —>



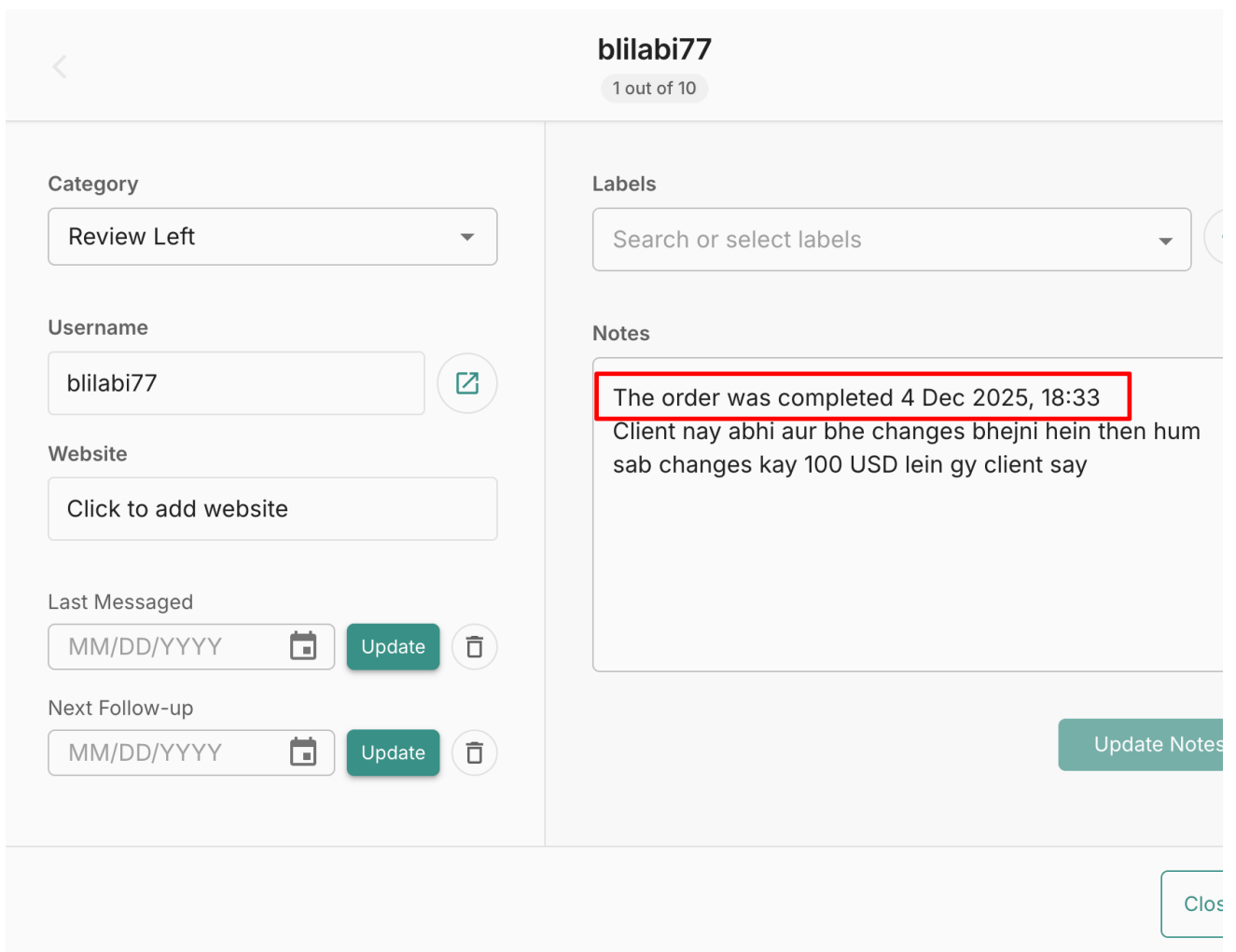
- On Discord:
 - Use command: /reviewleft



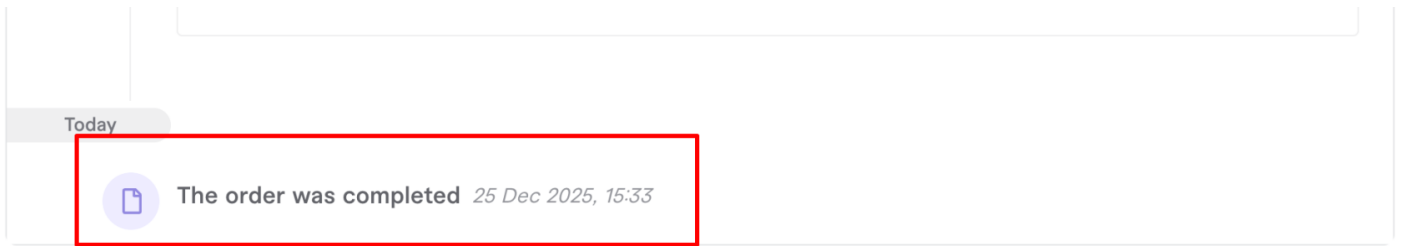
- In CRM:
 - Move client to **Review Left** category



- Add **order completion date** in Notes (exact format copied from Fiverr):



The order was completed 25 Dec 2025, 15:33



- Client will be followed for **30 days** as per Follow-Up SOP

☐ Review tracking must NOT mix with past clients.

? Key Understanding

Quality work alone is **not enough**.

Clear communication + proper verification + respectful closing

= Happy client + better reviews + repeat business.

? Golden Rule

A project is only complete when the client confirms it — not when we think it is.

Revision #1

Created 25 December 2025 12:21:32 by Jehanzaib

Updated 25 December 2025 12:43:54 by Jehanzaib