GENESIZE / ORIGINAL SHORT GUIDE

The Calm Client Handoff

Three small systems for finishing freelance projects clearly

01 Define the destination

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By Genesize

FREE TEACHING SAMPLE / THREE CHAPTERS

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Before you begin

A project is not finished simply because the last file is exported. The handoff is the moment someone else must find, understand and use the work without you beside them. This short guide helps a freelancer prepare that moment. Use it for a design package, written resource or other agreed deliverable, then adapt the details to your actual project and the tools your client uses.

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CHAPTER 01

Define the destination

Before organizing folders, name the person who will use the work next. A marketing lead may need a finished PDF; a designer taking over may need the source file and its dependencies. Ask what they expect to do first, which application they use and whether anyone else needs access. A file that opens on your computer is not yet a complete handoff.

Make a small delivery map with three columns: promised item, final filename and intended use. List what you agreed to supply, rather than everything produced during the project. For example, separate a web-ready logo from its editable source and from an early presentation. If something is outside the agreed delivery, clarify it before packing the final folder.

Choose one obvious home for the final work. Use a folder name that identifies the client, project and delivery date. Inside it, group files by purpose, not by the application that happened to create them. Keep a separate place for drafts so a client does not have to guess between filenames such as final, final-new and final-really-new.

Write a short start-here note in ordinary language. Tell the recipient which file to open first, what each folder contains and which software or account is required. Include any relevant limits, such as a missing font license or an image supplied for one particular use. Describe only permissions you can actually grant.

A ten-minute action

Create the delivery map now. Read it as the next person: can you identify the first file to open and the purpose of every item without asking the project creator? Mark each uncertain answer as a question to resolve.

CHAPTER 02

Test the recipient's route

Test the copy you intend to send, not the version still open in your working application. Export it, close the editor and open the exported file from its delivery folder. Check page order, visible text, links and the features you promised. If the client expects an editable document, change a harmless value in a separate test copy, save it and reopen it.

For a shared folder, check the actual permission path. An owner view can hide a broken invitation or a restricted file. Where your tools allow it, inspect the link from a separate browser session or ask the named recipient to confirm access. Do not make confidential work public just to simplify a test. Record what you could and could not verify.

If several files travel together, package a clean copy and extract it into a new folder. Confirm that the archive contains the delivery map and exactly the intended files. Look for accidental client notes, temporary exports or duplicate drafts. A short, predictable package is easier to support than a folder that contains your entire production history.

Write down the result of the check: file or link, date, application and outcome. Keep observations narrow. Opening a PDF on one laptop does not prove that every device or printer will behave the same way. If a requirement is uncertain, explain it and agree on the next check rather than describing the whole package as universally compatible.

A clean-copy check

Move the delivery package to a fresh location. Follow your own start-here note from the beginning. Write down the first point where you hesitate, repair that instruction or file, then repeat the affected step with the updated copy.

CHAPTER 03

Close with a clear next step

Your handoff message should help the recipient act, not narrate every revision. Start with what is ready and where it lives. Then name the first action, any known limitation and the question you need answered. A concise note might ask the client to open the delivery folder, review the two agreed exports and confirm access by an agreed date.

Keep completion, approval and support separate. Delivering the files does not automatically establish that the client approved them, and a friendly offer to help can sound unlimited when no boundary is stated. Refer to the actual project arrangement for review rounds, remaining work and support. If those details were never settled, discuss them instead of inventing terms in the final email.

Save a record of what you delivered: the final package, its version, the handoff note and the recipient's response when one arrives. Use the retention and deletion approach appropriate to your project. Avoid keeping unnecessary credentials or sensitive material in the package. When ownership of a shared resource needs to change, use the provider's supported transfer process.

Finally, notice which question returns after delivery. Repeated confusion about a filename, export or access step is a useful signal for your next project. Improve the start-here note or delivery map while the problem is fresh. The aim is not a handoff with no possible questions; it is a handoff in which the next person can see the path and ask a specific one.

Write the final paragraph

Draft three sentences: what is ready, what the recipient should do next, and how to raise a question within the agreed support arrangement. Remove any promise of availability or ongoing work that you have not actually agreed to provide.

KEEP BESIDE YOUR NEXT DELIVERY

Your final handoff check

- ☐ The named recipient and their first task are clear.
- ☐ The delivery map matches the agreed items and final filenames.
- ☐ The start-here note identifies the first file, required tools and limits.
- ☐ The exported or packaged copy has been opened and checked.
- ☐ Shared access was tested as far as the available tools permit.
- ☐ The handoff message states the next action and any unresolved question.
- ☐ Approval and support follow the actual project arrangement.
- ☐ A record identifies the delivered version and the checks completed.

Keep this checklist beside your next delivery. Choose one improvement that will make the recipient's first five minutes clearer, and add it to your normal project process.