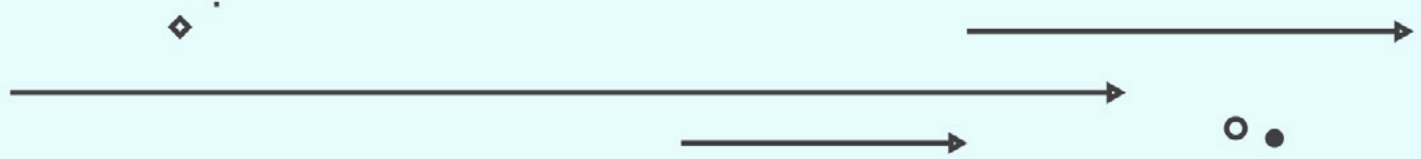

HOW TO SEAMLESSLY HAND OFF WEBSITES TO YOUR CLIENTS





You're reaching the finish line for your latest project. Over the course of weeks (or maybe even months), you've spent hours expertly crafting a website that brilliantly balances the client's needs (and inevitable edits) with your creative vision. From the initial meeting to the contract and throughout the production process, you've worked endlessly to design their dream site.

Now it's time to think about the client handoff. You need to hand off your final product in an intelligent, impressive, and informative way. The honest truth is that most designers don't think this far into the process. Instead, they'll plan the entire project with the idea that the handoff is the end; that they can just give the client the final files and give themselves a pat on the back.

From that moment forward, a bunch of scenarios can play out that affect how you can scale your business. Without a successful handoff, you could be looking at a frustrating future phone call from a confused client, an uneducated developer, or an overbearing boss. Or maybe you handed off the project somewhat successfully, but didn't think about building a long term relationship with the client, so they hire someone else for their next project. Or if your handoff wasn't thorough enough, they might need answers to a bunch of questions about using WordPress, and you're not sure how to invoice them for an hour of over-the-phone help. The relationship - and design - you've worked so hard on could be at risk simply because of an unsuccessful handoff.

Let's avoid all of those scenarios and use the handoff as the perfect opportunity to finish a project the right way and form a profitable long term partnership.

Here are ten ways that you can seamlessly hand off finished websites to your clients.





Long before the handoff, make sure your client knows what the design is supposed to achieve.

Sure, your client is paying you for a new website, but often they might not even know what that means. They might not understand what happens after the site is launched, or realize that it can significantly affect their bottom line. Teach your clients about what web design can achieve for them, and speak to them in a way they'll understand. Communicate the fact that your work can bring specific, measurable results and go beyond just "brand awareness" -- it can affect conversions, sales and much, much more.

Then during the handoff, you'll have set expectations properly, so you can avoid misunderstandings or multiple rounds of small edits. You'll also set yourself up to be a better candidate for future projects, because your client will understand the thought, value and hard work you put into the site.

Understand the benefit of the client handoff.


Every handoff should be thought out well in advance. Communicate the importance of the handoff to your team (whether they're in-house or freelancers) and to your client, so that both sides are prepared for the transition. Make sure that it's built into your timeline and budget, so that both you and your client don't assume that it's the other party's responsibility.





Choose the hostest with the mostest.

If you're handing off a website to a client that isn't the most technically savvy, the last thing you want to do is confuse them with a bunch of babble about server administration, WordPress updates, and security plugins. Choose a managed WordPress host that will take care of all of that for them, so you won't have to field those pesky phone calls and emails in the months going forward.



Building, launching, and managing your WordPress sites (and your clients') has never been easier. See why Flywheel is the most loved WordPress host on the planet.

Build


Build WordPress sites faster than ever. Flywheel's free demo sites, one-click staging environments, and seamless billing transfer make developing new projects a piece of cake.

Launch

Launch your sites on the best managed WordPress hosting platform on the planet. Rest easy with built-in performance tuning, server-level caching, and WordPress security.

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Flywheel's easy-to-use dashboard keeps you in the loop. Manage your projects, team, and contractors with Flywheel's powerful collaboration tools and never share passwords again.



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Spin up a free demo site today
& make your client relationships a dream!



Provide a project summary.

Consider including a project summary to go with the rest of your deliverables. Not only will this remind your client of all the top-notch work you've completed, but you can also use it to highlight how much value you've brought to the project. If the site is going to be handed off to someone else or picked up again at a later date, it's also a great place to add a few lessons learned or final recommendations.

Give your client an abundance of information.

The more your client understands about the work you've done, the better it is for you in the long run! Outline any features that require a bit of background understanding. Add a glossary for vocabulary and acronyms that might be confusing to someone outside of the industry. Not only will it provide value for your client, but it also gives them a great starting point for finding the answers to questions on their own. You could also consider providing tutorials (written is great; video is even better) to take your clients through the WordPress dashboard or basic site maintenance.

On the technical side, you should also make sure your code is well-commented, so that anyone who works on the site going forward is able to understand why you've coded something the way you have. Crafting clear and concise documentation is important in creating a site that can be easily adapted in the future.





Invoice your client the remaining bill.

When everything is said and done, you can invoice your client for the rest of the project. We recommend using an online invoicing software (Freshbooks, Wave and Harvest are all good options) to help save time putting invoices together and keep the invoices all in one place.

Need to send your client their hosting bill? With Flywheel's unique one-click transfer billing feature, you can send your client an invitation to a secure payment form where they can pay quickly and easily. It'll be the smoothest transfer of ownership you've ever done for a client site.

Once you've transferred billing to your client, you'll still have full access as a collaborator. The site stays in your Flywheel dashboard, so there's still no need for passing usernames and passwords around. Everything remains exactly the same, except your client pays the bill.

How would you like to pay?

I'll pay now
Choose to pay now if this is an individual site you wish to own the hosting account for. You will be prompted to choose a plan immediately.

My client will pay later
Choose pay later if your client will own the site. You can transfer billing to your client anytime during your demo site's life span.

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Ask your client for feedback (and maybe even a testimonial!)

As a designer, professional growth is incredibly important. It keeps your skills sharp and provides you with insights that you can't get from yourself or coworkers. Create a small survey to send to clients and ask them questions about the process, the project timeline, the deliverables, and the final product. Not only will it show your client that you value their opinion and your own work, but it also sets you up to ask for a testimonial (if the survey results are positive, of course!) or identify opportunities to improve.



Take a little time to reflect.

Write down your experience with the project (usually called a debrief) and take time to process your thoughts. This will help to improve your work overall, and allow you to make tweaks to your contracts, designs and/or client handoff and become even better at your work.

Start on a positive note -- maybe it's some small new technique you learned, or a new development shortcut -- and write it down so you have it saved for next time. Then, be honest about what didn't go as well, and note what you can learn from it for next time. And don't forget to double-check the financial aspects of the project. Was it profitable for you? Do you need to raise your rates? Would you like to pursue this type of work in the future?



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Offer minor outgoing support.

Once you've done good work for a client, you should be looking to discover how you can keep helping them once the project is finished. Don't hate me for this suggestion, but you can tell your clients that you will provide minor support – such as keeping their WordPress version updated, touching up a design, or other minor fixes – in return for a small (well, maybe not that small) fee. This way, you and your client will stay connected long after the initial project is completed and your project will continue to perform as it should. And, since you'll be working on the minor things, they'll be more likely to ask you for a quote on any future projects that come up!

While these ten ways may seem like a lot of extra work, they'll wind up working wonders for your business in the long run. All done? Now sit back, pour yourself a beer, and settle into a nice little Netflix marathon (until the next project comes along, that is).



What is Flywheel?

Flywheel is a delightful platform that empowers designers, developers, and digital agencies to focus on what they do best — building beautiful, functional sites for their clients. We make it a breeze to create and develop WordPress sites, handle hosting, manage projects, and ultimately scale your business.

Stop wasting time on server management, security plugins, caching, and all those other boring repetitive tasks that take your focus away from growing your business and jeopardize your relationship with clients. Get Flywheel and get back to doing what you love.

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