

# Offboarding Checklist

## Social Media Services

Thinking about canceling your social media services? Here's a checklist to guide you through the process. Each item may impact your brand visibility, engagement, and lead generation, so we encourage you to review carefully before proceeding.

- ❑ **Identify Meta Ads and Business Account Manager:** Once service is canceled, **full management of Meta Ads and Business accounts will fall solely to you or a new vendor.** Transferring ownership can be complex and is essential to prevent disruptions. After we remove ourselves, RevenueWell will no longer be able to provide account support or troubleshooting assistance.
- ❑ **Identify Meta Support Contact:** Following cancellation, **RevenueWell will no longer be able to submit disputes or support tickets to Meta on your behalf.** Any account-related issues will need to be resolved directly with Meta, which can often involve time-consuming steps and additional effort.
- ❑ **Plan for a Transition Period:** Social media significantly enhances SEO outcomes. **Customers who leverage both SEO and social media report up to a 40% increase in SEO conversions and 15% in SEO website traffic.** Without a social media strategy, be prepared to see potential decreases in SEO metrics, which may reduce leads and online visibility.
- ❑ **Anticipate Changes in Lead Flow and Brand Awareness:** Social media ads reach users who aren't already following you, extending your brand's reach and attracting new leads. **Canceling ad campaigns can lead to declines in leads, impressions, and overall brand visibility, potentially limiting your ability to reach and engage new audiences.**
- ❑ **Prepare Social Media Content in Advance:** Regular, engaging content keeps your brand relevant and helps you maintain social KPIs such as Impressions, Engagement Rate, and Follower Growth. Without a structured content plan, **you may fall behind on KPIs, and rebuilding momentum can be challenging** if you resume posting after an extended period.
- ❑ **Assign Responsibility for Online Reviews:** Managing your online reputation requires ongoing monitoring and timely responses. **If we're no longer handling this, ensure you have a dedicated resource to monitor, respond, and manage online reviews.** Leaving reviews unaddressed can negatively impact your brand perception and deter potential customers.



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- **Establish Regulatory Reminders to Stay in Compliance:** Social media guidelines in healthcare frequently change, and our team keeps you up-to-date with FTC, FDA, HIPAA, federal, state, Meta Business, and other industry-specific regulations. After canceling, **ensure you have a dedicated resource to stay current on regulatory updates to maintain compliance.**
  
  - **Set Up Reports to Monitor Activity:** Regular insights on social media performance provide valuable information about trends, customer behavior, and campaign effectiveness. **Without our analytics support, you'll need to manually track performance to understand what's working, make data-driven adjustments, and achieve your social media goals.**
  
  - **Prepare Transition Details:** If you plan to work with a new provider, ensure they have adequate knowledge of your previous campaigns, goals, and social media metrics. **Transitioning without a comprehensive handoff could lead to gaps in performance, brand consistency issues, and audience disconnect.**

If you have questions or concerns about offboarding, please contact your Customer Success Manager.