Vendor Offboarding Checklist

Pre-Offboarding Preparation

- [ ] **Review Vendor Contract:**
  Check for specific IT-related clauses on data handling, service transition, and confidentiality.

- [ ] **Audit Access and Permissions:**
  List all access rights and permissions granted to the vendor.

Notification

- [ ] **Inform Vendor:**
  Send a formal notification about the termination of their services, adhering to contractual timelines.

Financial Settlements

- [ ] **Clear Outstanding Payments:**
  Ensure all invoices related to IT services or products are settled.

Data Security

- [ ] **Retrieve Sensitive Data:**
  Ensure all sensitive data is returned or securely destroyed as per company policy.

- [ ] **Change Credentials:**
  Update passwords and any other security credentials that the vendor had access to.

- [ ] **Revoke Access:**
  Ensure all accesses granted to the vendor are revoked and audit logs for confirmation.

Transition of Services

- [ ] **Plan Service Transition:**
  Coordinate with the new vendor or internal team to take over services provided by the outgoing vendor.

- [ ] **Secure Documentation:**
  Obtain all relevant documentation, including service manuals, configuration details, and licenses.

Legal and Compliance Checks

- [ ] **Compliance Verification:**
  Ensure all actions comply with legal standards and company policies.

- [ ] **Document Offboarding Steps:**
  Keep a detailed record of all steps taken during the offboarding process for compliance and auditing.

Policy Update

- [ ] **Review Vendor Management Policies:**
  Suggest updates to vendor management strategies based on recent offboarding experiences.

Asset Retrieval

- [ ] **Recover Company Assets:**
  Ensure all physical or digital assets provided to the vendor are returned securely.

Feedback and Evaluation

- [ ] **Conduct Exit Interview:**
  Optionally, conduct an exit interview to gather feedback and insights on the vendor's performance and the offboarding process.

- [ ] **Internal Review:**
  Evaluate the offboarding process to identify areas for improvement.

Update Internal Systems

- [ ] **Notify Stakeholders:**
  Inform all relevant departments about the vendor change to prevent operational hiccups.

- [ ] **Update Systems and Databases:**
  Remove vendor details from all internal systems and update records accordingly.