Vendor offboarding checklist

Ending a vendor relationship has a deadline at the start and a record to keep at the end. Miss the notice date and the contract renews. Skip the exit steps and the vendor keeps your data and its access. This checklist covers both, in the order the work happens.

Vendor _____ Completed by _____ Date _____

Before you give notice

- [ ] The contract's termination date, notice period and last day to give notice are confirmed from the signed agreement.
- [ ] The reason for ending the relationship is written down and approved by the people your policy names.
- [ ] Termination fees, minimum commitments and other exit costs are identified.
- [ ] A replacement vendor or an in-house plan is in place for any service you still need.
- [ ] The transition help the vendor owes you under the contract is identified.

Give notice properly

- [ ] Notice is sent in the form the contract requires, to the address it names, before the deadline.
- [ ] Proof that the notice was sent and received is kept with the contract.
- [ ] Automatic renewal is cancelled where the contract or the vendor's billing system requires a separate step.
- [ ] Everyone who uses the vendor is told the end date.

Recover data and assets

- [ ] Your data is returned in a format you can use, and you have confirmed it is complete.
- [ ] The vendor certifies in writing that your data has been destroyed, including backups, on the schedule the contract sets.
- [ ] Data held by the vendor's subcontractors is covered by the same certification.
- [ ] Equipment, badges, keys and documents are returned in both directions.

- [ ] Licenses and intellectual property are handed over as the contract provides.

Remove access

- [ ] The vendor's user accounts in your systems are disabled.
- [ ] Network connections, remote access and service accounts are shut off.
- [ ] Shared passwords and keys the vendor knew are changed.
- [ ] Building access for the vendor's staff is removed.
- [ ] Your staff's accounts in the vendor's systems are closed, after anything you need has been exported.

Close the books

- [ ] Final invoices are reconciled, and credits or refunds owed to you are collected.
- [ ] Recurring payments to the vendor are stopped.
- [ ] Open issues, findings and remediation items are closed or formally accepted.
- [ ] The obligations that survive termination, such as confidentiality, are noted with their end dates.

Keep the record

- [ ] The vendor's status is changed to show the relationship has ended. The record is not deleted.
- [ ] Contracts, reviews and documents are retained for as long as your retention policy requires.
- [ ] Scheduled reviews and reminders for the vendor are stopped.
- [ ] Lessons from the relationship are recorded for the next selection.

Dates to pull from the contract

Date	Why it matters
Last day to give notice	Miss it and the agreement can renew for another term
Termination date	The day the service and your payment obligation end
Data return deadline	How long the vendor has to hand your data back
Data destruction deadline	When the vendor must certify that your data is gone
End of surviving obligations	How long confidentiality and similar terms continue

A free checklist from VendorRisk, vendor management software for regulated institutions. More guides, checklists and templates at vendorrisk.com/resources.