

Vendor Handoff Checklist

Use this checklist before an agency, contractor, MSP, or third-party provider changes so internal ownership is clear before the handoff.

How to use this Work through the checklist before the event date, assign owners for every unresolved item, and update your operating record as decisions are made.

Vendor-managed assets

<input type="checkbox"/> List every system the vendor manages or administers	<input type="checkbox"/> Review domains, DNS, website, CMS, and hosting
<input type="checkbox"/> Review analytics, tags, ad accounts, and pixels	<input type="checkbox"/> Review automations, integrations, and API credentials
<input type="checkbox"/> Review vendor-owned documentation and runbooks	<input type="checkbox"/> Identify critical workflows supported by the vendor

Ownership transfer

<input type="checkbox"/> Assign internal business owner for each system	<input type="checkbox"/> Assign internal primary administrator
<input type="checkbox"/> Assign backup administrator	<input type="checkbox"/> Move billing contact where needed
<input type="checkbox"/> Update vendor contacts and notification recipients	<input type="checkbox"/> Confirm password manager or secret manager location

Closeout and verification

<input type="checkbox"/> Verify admin access after transfer	<input type="checkbox"/> Rotate credentials where appropriate
<input type="checkbox"/> Confirm renewal and cancellation dates	<input type="checkbox"/> Document remaining vendor dependencies
<input type="checkbox"/> Record unresolved risks and next actions	<input type="checkbox"/> Schedule follow-up review after transition

Most missed items

<input type="checkbox"/> Domain registrar access
<input type="checkbox"/> Analytics and tag manager ownership

Ad account billing ownership

API credentials created by the vendor

Automations no one internally understands

Atlariem record

Example record: vendor -> connected assets, internal owners, admin coverage, renewal dates, credentials location, remaining risks.

Make it repeatable

Atlariem maps vendor-managed assets to internal owners, administrators, renewals, credentials, and dependencies before the handoff gets messy.