Supplier Exit and Handover Worksheet

Prepare a supplier transition with clear dependencies, deliverables, checks and decision owners.

How to use these four pages

1. Choose one service, its ending event and the receiving owner.

2. Identify what must be received, controlled and checked after the change.

3. Agree access timing and information responsibilities with authorised people.

4. Record verified items, open actions and the acceptance decision.

A practical working aid

Use the blank records for your own discussion. Examples are fictional, not client case studies. Print to complete by hand or adapt the prompts in your own document; this PDF is not a fillable form.

Keep completed records confidential. Use references to protected evidence rather than passwords, customer records or sensitive system details.

Online instructions and companion article

Read the guide

Read the article

Source guidance

NIST Cybersecurity Framework (CSF) 2.0 — GV.SC-10

NIST SP 1305: Cybersecurity Supply Chain Risk Management Quick-Start Guide

Public guidance checked 16 November 2026. The source material informs the approach; no endorsement is implied. This worksheet supports planning and record-keeping. It does not authorise testing, certify compliance or replace an agreed specialist review.

Free to use and adapt within your business with the GRCPreneur acknowledgement retained.

A fictional worked example

Illustrative entries only. No real client, vendor result or completed implementation is claimed.

Record	Illustrative entry
Service and event	A consultancy plans to move support for its booking service.
Handover item	Exported records, expected attachments and operating instructions.
Current evidence	Receiving administrator can open the export; attachments remain unchecked.
Dependency	A recovery contact still points to the outgoing provider.
Next actions	Owner assigns the record check and an authorised recovery-contact transition.
Acceptance	Pending the checks. Continuing access needs a purpose and ending condition.

Before using the blank pages

Agree who will review the record and what decision it supports. Mark assumptions, proposed actions and unverified claims clearly. Copy pages 3 and 4 when you need more space.

Your working record

Project / record ID: _____ Date: _____

Service, event and owners

What ends or changes? Who receives the service and approves acceptance?

Dependencies and deliverables

Accounts, recovery, integrations, records, formats and operating instructions.

Access and transition decisions

Authorised changes, timing, continuing access and ending conditions.

Information and evidence

Return, retention, disposal and confirmation. Use protected references.

Acceptance and open items

What was checked? What remains? Who decides and when is the next review?

Use protected evidence references. Do not enter credentials or confidential customer details.

Handover checks and acceptance

Related record / requirement: _____ Review date: _____

Item / dependency	Check / evidence reference	Owner / due date	Status / decision

Review before the next decision

- Essential dependencies and receiving owners are identified.
- Access changes have suitable authority, timing and checks.
- Return, retention and disposal questions have an owner.
- Acceptance records its scope, open items and next review.

Decision, authority and next checkpoint

Proceed / revise / defer / stop. State the decision scope, conditions, approver and date.

A completed record documents a review. Approval applies only to the stated scope and does not establish that untested work has succeeded.