

MSP Client Offboarding Documentation SOP

Document no.	SOP-MSP-003
Revision	1.0
Owner	Technical Account Manager
Effective date	October 15, 2026
Review cycle	Every 12 months

1. Purpose

To end every client relationship cleanly and securely, so the client or its new provider receives complete documentation and credentials, the MSP removes all of its access and tools, and nothing is left behind.

2. Scope

Applies whenever a managed services agreement ends, whether the client moves to another provider or brings IT in-house. It covers the period from the termination notice to the final archive of client records.

Definitions

Handover package	The exported client documentation, network diagrams, asset list and runbooks given to the client at the end of the agreement.
Incoming party	The client's internal IT team or new provider that takes over the environment.
Delegated admin access	A partner relationship that lets the MSP administer a client's cloud tenant without a client user account.
Retention period	How long the MSP keeps client records after offboarding before deleting them, as set by contract or policy.

3. Responsibilities

Technical Account Manager	Owns the offboarding plan, agrees the timeline and handover scope with the client and confirms completion.
Account Manager	Logs the termination notice, checks contract terms, transfers licenses and vendor accounts and closes billing.
Documentation Lead	Brings the client documentation up to date, exports the handover package and archives records after offboarding.
Systems Engineer	Transfers credentials securely, removes MSP agents, tools and access, and verifies the removal.
Client Point of Contact	Names the incoming party in writing, receives the handover and confirms each offboarding milestone.

RACI matrix

Activity	Technical Account Manager	Account Manager	Documentation Lead	Systems Engineer	Client Point of Contact
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Activity	Technical Account Manager	Account Manager	Documentation Lead	Systems Engineer	Client Point of Contact
Plan the offboarding and handover scope	R/A	C	C	C	C
Export the documentation handover package	A	-	R	C	I
Transfer credentials to the incoming party	A	-	I	R	C
Remove MSP tools and access	A	I	I	R	I
Close billing and archive records	I	R/A	R	-	I

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Managed services agreement and exit terms
- Offboarding checklist
- Client hub in the documentation platform
- Password manager with secure sharing
- RMM tool and security tool consoles
- PSA ticketing and billing system
- Records retention policy

5. Procedure

Step	Task	Owner	Done
5.1	Log the termination notice The Account Manager logs the termination notice in the PSA, checks the notice period and exit terms in the agreement and confirms the end date with the client in writing.	Account Manager	☐
5.2	Hold the offboarding planning call The Technical Account Manager agrees the timeline, cutover date, handover format and what is included with the Client Point of Contact and, if invited, the incoming party.	Technical Account Manager	☐
5.3	Confirm who receives the handover The Client Point of Contact names the incoming party and the people allowed to receive documentation and credentials, in writing, from an authorized approver. Warning: Never hand credentials to a new provider on their request alone. Wait for written authorization from a documented client approver.	Client Point of Contact	☐
5.4	Bring the documentation up to date The Documentation Lead reviews the client hub, fixes stale pages and fills gaps so the handover reflects the environment as it is today.	Documentation Lead	☐
5.5	Export the handover package The Documentation Lead exports the client documentation, network diagrams, asset inventory, runbooks and vendor list in the agreed format and shares it with the authorized recipients.	Documentation Lead	☐

Step	Task	Owner	Done
5.6	Transfer credentials securely The Systems Engineer shares every client credential through a secure, expiring vault share and records exactly which credentials were handed over and to whom. Checkpoint: An authorized client approver signs off the credential handover list.	Systems Engineer	☐
5.7	Transfer licenses, domains and vendor accounts The Account Manager moves software subscriptions, domain registrations, certificates and vendor portal accounts that the MSP holds into the client's ownership.	Account Manager	☐
5.8	Remove MSP agents and tools The Systems Engineer uninstalls RMM, remote access, monitoring, backup and security agents at the agreed cutover time, after the incoming party confirms its own tools are running.	Systems Engineer	☐
5.9	Remove MSP accounts and delegated access The Systems Engineer deletes MSP admin accounts, removes delegated admin access to cloud tenants and asks the incoming party to rotate any credential the MSP knew. Checkpoint: A final login test confirms the MSP can no longer reach any client system.	Systems Engineer	☐
5.10	Close billing and contracts The Account Manager stops recurring billing, cancels MSP-held subscriptions that were not transferred, issues the final invoice and closes the client in the PSA.	Account Manager	☐
5.11	Archive client records The Documentation Lead archives the client hub and tickets, then deletes client data from MSP systems when the retention period ends and logs the deletion.	Documentation Lead	☐
5.12	Confirm offboarding is complete The Technical Account Manager sends the client a completion letter listing what was handed over, what was removed and the date records will be deleted.	Technical Account Manager	☐

6. Quality checks

- Credentials were shared only with recipients named in writing by an authorized approver.
- The handover package reflects the current environment, with no stale pages.
- No MSP agents, accounts or delegated access remain after cutover.
- Recurring billing stopped on the end date and the final invoice was issued.
- Client data is deleted at the end of the retention period, with the deletion logged.

7. Records

- Termination notice and confirmed end date
- Written authorization naming the incoming party
- Signed credential handover list
- Access removal verification
- Completion letter and records deletion log

8. KPIs

- Percentage of offboardings completed by the agreed end date
- Number of MSP tools or accounts found after cutover
- Time from termination notice to completion letter

9. Common mistakes

- Sending credentials to a new provider without written client authorization.
- Removing MSP tools before the incoming party's tools are running.
- Forgetting delegated admin access to cloud tenants.
- Exporting outdated documentation that the new provider cannot trust.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	October 15, 2026	Initial release	Ilia Pirozhenko

Approval

Prepared by	Approved by	Date

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