CLIENT SERVICE & TRANSITIONS

Client offboarding & secure handover

Provide a controlled exit that transfers authorised material, removes provider access and preserves continuity responsibilities.

DOCUMENT	PREPARED	STATUS
MSP-03	1 October 2026	Draft for adoption

Scope & application

Termination, partial service transfer and transition to another provider. Contract terms determine notice, deliverables, fees and retention; this framework adds no new termination charge.

Who does what

NovaSoft engagement lead

Scopes the work, assigns authorised personnel and maintains implementation and exception records.

Client service and risk owners

Approve access, business decisions, priorities, notices and residual risks; provide accurate scope and timely lifecycle requests.

Users and suppliers

Follow the approved arrangements, report issues and perform responsibilities assigned in the service schedule.

Draft for adoption. Confirm applicable requirements, implementation, owners and approval in the written client service schedule before operational use. Effective date is assigned on adoption.

THE POLICY IN PRACTICE

Control requirements.

01 Agree the exit plan

Verify the client owner and receiving party. Identify service end dates, transfer milestones, continuing support and records the client is entitled to receive under the agreement.

02 Prepare a useful handover

Provide agreed inventories, configuration documentation, client-owned exports, licence information and open issues. Separate reusable provider tools, third-party rights and restricted material from client deliverables.

03 Confirm recovery ownership

Record who will manage backups, restore keys and recovery procedures after handover. Confirm export compatibility, completion and any agreed restoration checks before retiring existing jobs.

04 Remove all access paths

Revoke delegated roles, remote agents, VPN access, service accounts, OAuth grants, API keys and integrations as applicable. Coordinate credential rotation and test removal without disabling client-owned identities.

05 Transfer through approved channels

Encrypt or otherwise protect sensitive handover material. Verify the recipient and record receipt. Keep secrets out of ordinary tickets, public links and unverified email attachments.

06 Close retention and responsibility

Apply the agreed retention schedule, legal holds and deletion process to remaining copies. Record inaccessible or supplier-held data and residual expiry dates. Confirm when NovaSoft's operational responsibility ends.

FROM POLICY TO DELIVERY

Operate. Record. Review.

01 Confirm the authorised exit request and transition scope.

02 Prepare and verify the handover package and recovery arrangements.

03 Obtain receipt, transfer ownership and revoke provider access.

04 Record retained material, deletion actions and final closure.

Agree with the client

- Receiving contacts and permitted deliverables
- Continuing service and cutover dates
- Credential and integration changes
- Retention, legal holds and deletion scope

Evidence to retain

- Exit plan and handover manifest
- Access revocation and recipient receipt
- Retention/deletion record and closure confirmation

Exceptions & review

Record the requirement, reason, affected scope, risk owner, compensating measures and expiry or review date. Seek approval before deviating, or use documented emergency authority and arrange prompt review. Exceptions cannot waive applicable legal duties.

Review trigger: For every exit or partial transfer; revisit if cutover dates or recipients change.

Proposed owner: NovaSoft engagement lead with the client service/risk owner. Review at least annually, and earlier when the trigger above applies. Version changes require an approval and client-impact record.

References & related information

ASD/ACSC - Managed service provider guidance

OAIC - Australian Privacy Principles guidelines

NovaSoft public policy library and application notes