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# Vendor Onboarding Checklist

Free Vendor Onboarding Checklist with AI customization. Industry-specific guidance for vendor onboarding checklist. Build your checklist now.

## Vendor Selection & Evaluation

- ☐ Define vendor requirements
- ☐ Issue RFP/RFQ
- ☐ Evaluate proposals
- ☐ Check references
- ☐ Verify credentials
- ☐ Assess financial stability
- ☐ Review insurance coverage
- ☐ Conduct site visits
- ☐ Compare pricing
- ☐ Evaluate capabilities
- ☐ Check compliance status
- ☐ Make selection decision

## Legal & Compliance

- ☐ Execute vendor agreement
- ☐ Review terms and conditions
- ☐ Negotiate contract terms
- ☐ Set SLA requirements
- ☐ Define KPIs
- ☐ Establish penalties
- ☐ Review indemnification
- ☐ Confirm insurance requirements
- ☐ Verify licenses
- ☐ Check certifications
- ☐ Complete W-9 form
- ☐ GDPR/privacy compliance

## Financial Setup

- ☐ Vendor registration in system
- ☐ Set up vendor account
- ☐ Configure payment terms
- ☐ Establish payment method
- ☐ Set up ACH/wire transfers
- ☐ Define approval workflows
- ☐ Set spending limits
- ☐ Configure tax settings

- ☐ Set up invoicing
- ☐ Define billing cycle
- ☐ Establish credit terms
- ☐ Document payment process

## Security & Access

- ☐ Security assessment
- ☐ Background checks
- ☐ NDA execution
- ☐ Access requirements defined
- ☐ Badge/credential issuance
- ☐ System access provisioning
- ☐ VPN setup if needed
- ☐ Security training completed
- ☐ Compliance verification
- ☐ Data handling agreements
- ☐ Incident response procedures
- ☐ Termination procedures

## Operational Setup

- ☐ Define scope of work
- ☐ Establish deliverables
- ☐ Set performance standards
- ☐ Create work procedures
- ☐ Define communication protocols
- ☐ Establish reporting requirements
- ☐ Set meeting cadence
- ☐ Define escalation process
- ☐ Quality standards agreement
- ☐ Change management process
- ☐ Document approval process
- ☐ Emergency procedures

## System Integration

- ☐ Technical requirements review
- ☐ API access setup
- ☐ Data exchange protocols
- ☐ Testing environment access
- ☐ Integration testing
- ☐ Security validation
- ☐ Performance testing
- ☐ Backup procedures
- ☐ Monitoring setup
- ☐ Alert configurations
- ☐ Documentation requirements

- ☐ Support procedures

## Training & Knowledge Transfer

- ☐ Vendor orientation session
- ☐ Company policies training
- ☐ Process training
- ☐ System training
- ☐ Safety procedures
- ☐ Quality standards training
- ☐ Compliance training
- ☐ Tool access training
- ☐ Documentation review
- ☐ Q&A sessions
- ☐ Competency verification
- ☐ Training documentation

## Communication Setup

- ☐ Key contacts identified
- ☐ Communication matrix created
- ☐ Regular meeting schedule
- ☐ Reporting templates
- ☐ Issue tracking system
- ☐ Escalation contacts
- ☐ Emergency contacts
- ☐ Distribution lists
- ☐ Collaboration tools access
- ☐ Document sharing setup
- ☐ Status reporting format
- ☐ Feedback mechanisms

## Performance Management

- ☐ KPI definitions
- ☐ SLA monitoring setup
- ☐ Performance dashboards
- ☐ Reporting schedule
- ☐ Review meeting cadence
- ☐ Scorecard creation
- ☐ Improvement plans
- ☐ Incentive structures
- ☐ Penalty procedures
- ☐ Audit schedule
- ☐ Compliance monitoring
- ☐ Relationship reviews

## Risk Management

- ☐ Risk assessment completed
- ☐ Mitigation strategies defined
- ☐ Business continuity planning
- ☐ Disaster recovery procedures
- ☐ Insurance verification
- ☐ Liability clarification
- ☐ Contingency planning
- ☐ Alternative vendor identification
- ☐ Exit strategy defined
- ☐ Data ownership clarified
- ☐ IP protection measures
- ☐ Conflict resolution procedures

## Documentation

- ☐ Contract filed
- ☐ Insurance certificates
- ☐ Licenses documented
- ☐ Contact list created
- ☐ Process documentation
- ☐ Training records
- ☐ Meeting minutes
- ☐ Performance records
- ☐ Compliance certificates
- ☐ Audit reports
- ☐ Issue logs
- ☐ Change requests

## Go-Live & Monitoring

- ☐ Kickoff meeting held
- ☐ Initial deliverables reviewed
- ☐ Early performance assessment
- ☐ Issue identification
- ☐ Quick wins celebrated
- ☐ Feedback collected
- ☐ Adjustments made
- ☐ Regular monitoring begun
- ☐ Relationship building
- ☐ Continuous improvement
- ☐ Value measurement
- ☐ Long-term planning

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