


CRM Decommissioning Checklist

 Show only Checklist

Display Style
Default 

Planning & Scope

Define project scope, stakeholders, and exit criteria.

Project Goals & Objectives

Write something...

Decommissioning Reason

- System Replacement
- Cost Reduction
- Business Restructuring
- Other



Estimated Project Duration (Days)

Enter a number...

Planned Start Date

Enter date...

Planned Completion Date

Enter date...

Affected Systems/Integrations

- Salesforce
- Marketing Automation
- ERP System
- Data Warehouse

Project Manager Name

Write something...

Data Extraction & Archiving

Extract critical data for long-term retention and archiving strategy.

Data Extraction Start Date

Enter date...

Estimated Records to Extract

Enter a number...

Description of Archiving Location & Method

Write something...

Data Format for Archive

- CSV
- XML
- JSON
- Other

Sample Archive File (for validation)

 Upload File

Estimated Data Extraction Completion Date

Enter date...

Data Sanitization & Deletion

Ensure data is properly sanitized and deleted from all systems and backups.

Detailed Data Sanitization Procedures

Write something...

Number of Records Permanently Deleted

Enter a number...

Data Deletion Method Used

- Overwrite
- Degauss
- Physical Destruction
- Secure Erase

Proof of Data Destruction (e.g., Certificate of Destruction)

 Upload File

Date of Data Sanitization Completion

Description of Any Exceptions or Deviations

System Shutdown & Access Revocation

Shutdown the CRM instance and revoke all user access permissions.

Planned Shutdown Date

Planned Shutdown Time

Number of Users Affected

Enter a number...

Access Revocation Steps Completed

- Revoke User Permissions
- Disable User Accounts
- Remove Role Assignments
- Deactivate API Keys

Shutdown Method

- Clean Shutdown
- Forced Shutdown

Confirmation Code Entered During Shutdown

Write something...

Notes on Shutdown Process (e.g., errors, unexpected behavior)

Write something...

Authorized Shutdown Signature

Integration Disablement

Disable or remove integrations with other systems.

Integration 1: Status

- Enabled
- Disabled
- Scheduled for Disablement

Integration 2: Status

- Enabled
- Disabled
- Scheduled for Disablement

Scheduled Disablement Date (if applicable)

Enter date...

Notes on Integration Disablement

Write something...

Number of Active Connections

Enter a number...

Disable Method

- API Disablement
- Manual Deletion
- Other

License Management

Cancel licenses and manage associated costs.

Number of Licenses to Cancel

License Type (e.g., User, API)

User License

API License

Other

Cancellation Request Date

Cancellation Request Notes (e.g., reason for cancellation)

Cost Savings Estimate

Vendor Confirmation Received?

Yes

No

Vendor Cancellation Confirmation Date

Enter date...

Documentation & Knowledge Transfer

Document the decommissioning process and transfer knowledge to relevant teams.

Detailed Decommissioning Procedure Documentation

Write something...

Record of Data Archiving Methodology

Write something...

Archiving Data Backup Verification File

 Upload File

Knowledge Transfer Method (e.g., Training, Shadowing, Documentation)

- Training Sessions
- Shadowing
- Detailed Documentation
- Combination

Date of Knowledge Transfer Completion

Enter date...

Names of Individuals Receiving Knowledge Transfer

Write something...

Post-Decommissioning Validation

Verify that all data and systems have been properly decommissioned.

Decommissioning Completion Date (Verification)

Enter date...

Number of Confirmed Data Deletions (Sample Audit)

Enter a number...

Confirmation of Access Revocation (Select all that apply)

- User Accounts Disabled
- API Keys Revoked
- Third-Party Integrations Removed

Notes on any Validation Issues Encountered

Write something...

Overall Validation Status

- Complete
- Partial
- Incomplete

Validation Sign-off

Communication & Stakeholder Updates

Communicate decommissioning progress and final results to stakeholders.

Initial Communication Date

Enter date...

Summary of Initial Communication

Write something...

Communication Method (e.g., Email, Meeting)

- Email
- Meeting
- Internal Newsletter
- Project Management System Update

Number of Stakeholders Notified

Enter a number...

Date of Progress Update 1

Enter date...

Summary of Progress Update 1

Write something...

Stakeholder Feedback Received (Yes/No)

Yes

No

Stakeholder Feedback Details (if applicable)

Write something...

Legal & Compliance Review

Review legal and compliance requirements related to data disposal.

Applicable Data Privacy Regulations (e.g., GDPR, CCPA)

GDPR

CCPA

HIPAA

Other (Specify in Long Text)

Detailed Explanation of Compliance Considerations

Write something...

Date of Legal Review Completion

Enter date...

Number of Records Subject to Legal Hold

Enter a number...

Summary of Legal Hold Status and Resolution

Write something...

Data Retention Policy Compliance Status

- Compliant
- Non-Compliant (Requires Action)

Supporting Legal Documentation (e.g., agreements, correspondence)

 Upload File