

YOUR KEY DATES

Renewal date _____

Notice due date _____

Notice method _____

1 Before you talk to vendors

Before notice

- ☐ Find your notice date, auto-renewal terms and export rights in your contract.
- ☐ Check whether your notes, history and attachments can be exported, and what that costs.
- ☐ Write down every tool, spreadsheet and handoff from first call to placement.
- ☐ Ask the recruiters who use the system most what they'd keep and what they'd fix.
- ☐ Check to see if you're using the latest features, and whether a settings change would close the gap.
- ☐ Decide whether you have a setup or training problem, or a bigger one.

2 Before you give notice

Before notice

- ☐ Watch demos built on your own jobs and records.
- ☐ Ask every vendor the three questions below, and get the answers in writing.
- ☐ Get the migration plan for your current system in writing.
- ☐ Call a reference at a firm close to your size.
- ☐ Decide whether to switch or stay, and write down why.
- ☐ If you're switching, send notice the way your contract says, to the right person.

3 Before you sign

- ☐ Confirm the term length, renewal terms and export rights in the new contract.
- ☐ Confirm in writing what's included and what costs extra.
- ☐ Make sure your email attachments are named in the agreement.
- ☐ Get the names and roles of everyone working on your setup.
- ☐ Have your attorney read the contract before you sign it.

4 Before your team starts using it

- ☐ Review your setup and your migrated data in a test version of the system, and take your time.
- ☐ Ask what fixes cost after you approve the data.
- ☐ Schedule training for the whole team, including yourself.
- ☐ Keep a way to look up old records in case you need them.

Ask every vendor, in writing

Check a box when you have the answer in writing.

	Vendor 1	Vendor 2	Vendor 3
01 How will you move my data from my current system, and where will each piece end up?	☐	☐	☐
02 Can I review my data in a test version before my team starts using it?	☐	☐	☐
03 Will my notes, activity history and email attachments come over, and what will that cost?	☐	☐	☐