

Contracting & Implementation Planning

This section outlines what typically follows the selection of an ITAD vendor, key documents to have in place, and considerations around working with multiple vendors. We've also included template resources to support internal planning and streamline the transition to your selected partner(s).

What to Expect After Selecting an ITAD Vendor

Once a vendor (or vendors) are selected, the next phase typically includes finalizing legal agreements, establishing clear scopes of work, and setting expectations through an implementation or onboarding plan.

A well-documented framework helps all parties stay aligned and ensures a consistent, secure, and auditable process for IT asset disposition.

Key Documents Typically Required



Master Services Agreement (MSA) *Utilize your company's MSA template.*

- **Legal Authority & Scope** – Defines parties, applicable jurisdictions, and relationship structure (parent agreement).
- **Confidentiality & Data Security** – Clear expectations for data handling, breach notification, and access controls.
- **Insurance Requirements** – Liability, cyber, and environmental insurance minimums.
- **Indemnification & Limitation of Liability** – Risk allocation for data breaches or environmental incidents.
- **Termination Clauses** – Conditions for early exit or non-renewal.
- **Audit Rights** – Right to inspect vendor processes, systems, and facilities.



Statement of Work (SOW) *Require usage of your vendor's SOW template.*

- **Detailed Scope of Services** – Includes pickup types, asset categories, and frequency of service.
- **Service Level Agreements (SLAs)** – Defined expectations for timeliness, reporting, documentation, and responsiveness.
- **Asset Value Recovery Terms** – How resale proceeds are handled, shared, or offset.

- **Pricing & Fee Structure** – Clear breakout of all costs: pickup, labor, destruction, logistics, reporting, etc.
- **Resale Grading Scale** – Clear understanding of vendor's grading approach and categories for reselling equipment.
- **Reporting Deliverables** – Chain of custody, certificates of destruction, sustainability metrics, and resale reports.
- **Site Locations & Contacts** – Complete list of participating sites and site-level contacts.



Implementation Plan

- **Transition Timeline & Milestones** – Onboarding sequence, portal setup, testing, and go-live checkpoints.
- **Roles & Responsibilities** – Vendor vs customer tasks during startup and steady-state.
- **Training & Support** – Intro to reporting tools, escalation paths, and support SLAs.
- **Contingency Plans** – Procedures for failure points such as missed pickups or tech outages.
- **Communication Cadence** – Recurring touchpoints (e.g., weekly check-ins, QBRs).
- **Scheduling Coordination** – Defined process for scheduling recurring or ad-hoc pickups across all locations.
- **Portal Demonstration & Setup** - Onboarding and training for utilizing the portal
- **API Integration** Timeline & Resourcing (if applicable)

Dynamic can help consultatively review or adapt these documents as needed— whether you're formalizing with us, another provider, or multiple vendors.

Considerations for Utilizing Secondary ITAD Vendors

In many cases, organizations choose to work with more than one ITAD vendor to support operational needs or as a backup in case of issues.

A secondary or backup vendor can also offer:

- Redundancy and risk mitigation
- Flexibility for business continuity planning
- Regional or international coverage
- Price benchmarking and service comparison

If a secondary vendor strategy is under consideration, ensure consistent standards and reporting frameworks are maintained across all partners for easier management and performance evaluation.