Checklist for Businesses Before Changing IT Support Providers

Switching IT support providers is a significant decision that can impact your business operations and security. To ensure a smooth transition and select the best provider for your needs, follow this checklist:

1. Assess Current IT Needs and Issues

- **Inventory of IT Assets:** Document all hardware, software, and network components as this information may be required to assemble a proposal and costs. This is due to the protections being installed as well as any associated monitoring agents. If the current list of assets is unknown, any reputable providers you are considering should have the ability to assess the network for you assuming said network is in a domain.
  Note: A domain requires a server and all PC's are connected back to a central location for network administration. A workgroup is a setup where all machines work somewhat independently.

- **Identify Pain Points:** Take time to speak with your team about their challenges above and beyond what you might be facing as an individual. If you are experiencing issues, it's safe to assume you are not alone and other issues need to be addressed. A new provider may need to address some of your issues first before implementing their service offerings.

- **Determine Business Requirements:** Understand the specific IT support needs based on your business goals and industry requirements. These might include hours of operation, compliance requirements for cybersecurity, assistance with budget creation and alignment, a consulting component to assist in making decisions or working with a local provider versus a national IT support compay.

2. Evaluate Current Provider's Performance

- **Review Service Level Agreements (SLAs):** If you are in an agreement with a provider, assess if they have met the agreed-upon performance metrics as this may be needed in your business requirements.

- **Review your Terms and Obligations:** You may be in a multi-year agreement with your provider with a possibility of legal action. Often, your potential new IT provider can help you understand your options. Poor service may mean you can break this contract without legal action. It is important you talk to your potential new provider about contracts early in the IT evaluation process.

- **Incident Response:** Evaluate how effectively the current provider handled past IT issues and incidents and what your expectations are going forward. If the current provider takes hours or days to respond to support requests, you want a provider that can proof source their response times and associated support request methods.

3. Define the Scope of Work for the New Provider

- **List Required Services:** Create a comprehensive list of criteria for the new provider based on areas of pain as well as services needed that are not being provided today. This might include:

- o Unlimited Support
- o A dedicated strategist/ Virtual Chief Information Officer (vCIO)
- o A locally owned and operated provider

- **Performance Metrics:** Set clear expectations for response times, resolution times, and other performance indicators. Any reputable IT provider should be able to provide their escalation process as this should be included in the Master Services Agreement (MSA) or associated Statement of Work (SOW).

- **Budget Planning:** Separate all IT hardware, software, and backup costs, then determine the budget allocated for IT support services. This should be specific to support, and cybersecurity solutions only. Email and backup costs – for example –are costs that are not typically included in the monthly investment with IT support and cybersecurity services.

4. Research Potential IT Support Providers

- **Provider Background:** Investigate the experience, reputation, and client testimonials of potential providers. This might include outside references, such as Google reviews, from users stating their experience with the provider.

- **Service Offerings:** Ensure they offer the specific services your business needs. This is why it is imperative that you determine your needs up front during the evaluation. If you do not know what you or your organization require, it will be difficult for any provider to meet your expectations. Take the time to determine what you are looking for in a successful partnership and be sure to explain this to any organizations you are considering.

- **Security Credentials:** Verify their certifications and compliance with industry standards and regulations. Keep in mind, there is no governing body or regulators that dictate and determine what compliance should look like for managed services providers. Ideally, you want to work with a partner that has a basis for their internal security to ensure it is fully comprehensive and that it aligns with any compliance requirements you may have within your industry.

5. Meet Potential IT Support Providers

- **Keep The List Short:** Within any market there are a handful of providers that have a good reputation, longevity and proven performance in the market. Be sure that anyone you are meeting with meets these expectations or can provide documentation of such. You can always find a low cost provider, but for those organizations that value support and security, you should base your decision on the solutions and services provided as opposed to the cost.

- **Do They Understand Our Needs:** Upon completion of any discussions, ask the representative to provide a summary or recap of the discussion. This ensures that you have communicated

your needs effectively and that they have taken to time to hear you so they can assemble the proper solution to meet your needs.

6. Perform an Assessment of Your Network

- **Confirming Counts, Solutions and Hardware:** Although you may have taken inventory of your equipment, it helps to have number confirmation to ensure nothing was missed. Any reputable provider will want to assess your network and hardware to ensure a complete understanding of needs as well as to provide any immediate recommendations based on their findings.

7. Introductions

- **Introduction to Your Team:** Starting an IT support company does not require much more than knowledge and finding partners with solutions you can resell. This is why it is important for you to meet your team before making a final decision. These people will be your support mechanism so you should understand their roles and responsibilities.

- **Office Visit:** What does their facility look like? How are they tracking their performance? What redundancies do they have in place in the event of a disaster? These questions illustrate the importance of visiting a prospective providers office as this will give you true feel about their capabilities and how they support you and your users.

8. Prepare Documentation and Data

- **Backup Data:** Once a decision has been reached on providers and prior to implementation, ensure all critical data is backed up securely before transitioning. If you plan to archive data, you should perform this work before the new provider's evaluation of your network. They may implement a larger allocation than you need since this evaluation could provide a false storage and backup requirement, increasing costs of the backup.

- **Document Processes:** Have detailed documentation of your IT infrastructure and processes. If you are with a provider now, they should have this and will provide it to the new IT support vendor. If this information is not provided or available, any reputable IT provider will create their own documentation.

- **Access and Permissions:** List all access controls and permissions that the new provider will need. This too can be collected during the implementation process.

9. Plan and Begin the Transition Process

- **Transition Timeline:** Determine a "Go Live" date for implementation of the new provider. The provider will typically work with you to dictate this in addition to providing insights on the solutions they will be deploying and what to expect. Make sure that the provider is not going to do anything that could impact your ability to work or that might result in unscheduled downtime.

- **Communication Plan:** Inform all stakeholders, including employees, about the upcoming changes. Ask the new provider if they offer any initial trainings around how to request support

and what to expect when you do as this will set proper expectations in addition to starting the partnership by meeting proper expectations.

- **Contingency Plans:** Develop plans for handling any potential issues during the transition. This would include making sure your backups are valid and can be restored in the event of an issue.

Let us walk you through the process. To learn more about Throttlenet's IT support implementation process, and why we might be the right IT provider for you, schedule a [free consultation](#) today!