

# SWITCHING MANAGED SERVICE PROVIDERS MADE SIMPLE



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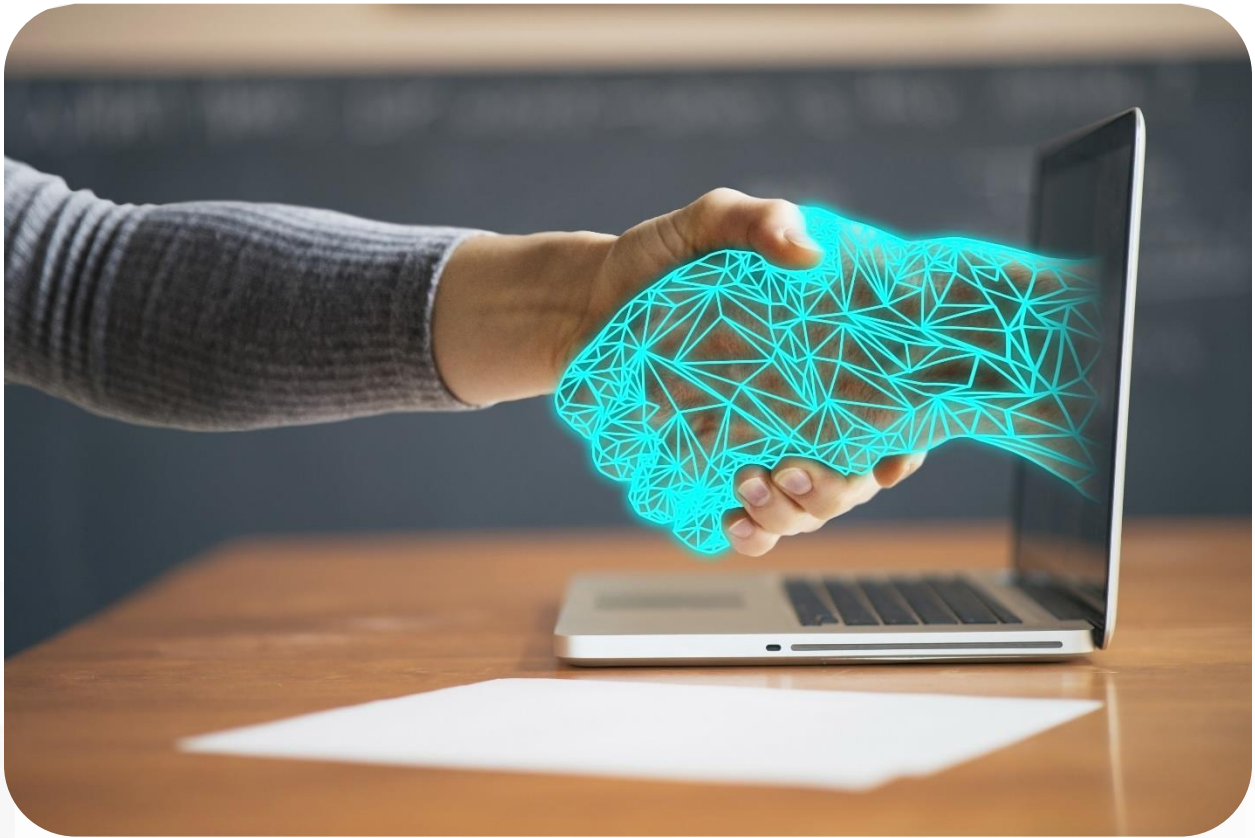
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## INTRODUCTION



**M**any businesses turn to outsourced IT help. Lacking internal tech resources, they look to a managed service provider (MSP) to remotely manage or deliver IT services. But is your business happy with the level of service you're getting from your MSP? Don't fear changing to a provider who can do more, perhaps for less. This guide simplifies the process of switching MSPs by outlining what to expect.

Few of us like change, especially when it comes to technology and business processes. Still, migrating providers can be relatively painless when you understand the steps involved. We're going to describe eight steps, but before you get overwhelmed, many of them aren't ones you do directly. The MSP can handle it for you.

## STEP 1: SHOP FOR A NEW MSP

You're already working with a managed service provider. So, you know the benefits (or what they'll be with the right partner):

- access to IT monitoring and management, help desk support, cloud setup, and compliance experts all in one place;
- experienced professionals protecting you from a cyberattack while also planning for recovery;
- streamlined processes and improved productivity;
- ability to focus on growing your business while enjoying fewer IT costs.

When meeting with new potential providers, you should expect them to:

- explain their processes and how they protect against unexpected downtime;
- ask questions about your objectives;
- show they are using the latest technology;
- share their technical experience and expertise;
- tell you how they would tackle any issues.

Keep in mind that you're looking for an IT partner that's always available and cost effective. Select the partner that provides technical leadership and robust cybersecurity.

## STEP 2: READ YOUR CURRENT CONTRACT

Before moving on to a new provider, you'll need to review your agreement with your current provider. You want to see what steps you have to take to end the relationship. You likely need to give notice. Plus, there will be policies about how you can communicate your intentions. Also, look into ending your payments to that MSP.

Knowing what steps to take ahead of time can help smooth your transition. Your new MSP can help with this stage, but remember they are IT experts, not lawyers.

## STEP 3: AUDIT YOUR EXISTING IT

When you decide to start a new MSP relationship, they'll need to know what your IT infrastructure entails. This involves:

- auditing your environment to determine system needs and what areas need support;
- creating an inventory of your software (ensuring you have all the antivirus and anti-malware solutions you need);
- discussing your cybersecurity practices, including firewall use, data backup plans;
- taking a look at your computer equipment and planning to remove any tech that belongs to your current MSP;
- identifying opportunities for you to find efficiencies or cost savings using new hardware or software.

Don't worry, this is a step that the MSP can take the lead on, although you should expect to have to answer questions. You can save both parties time by documenting what services your current provider uses. Look at an invoice or the original contract to find this info.

## STEP 4: SIGN NEW CONTRACT



Once the new MSP has an overall idea of what's involved in your engagement, they'll draft a contract. You'll need to be involved in this step by reviewing and signing the document. You'll also need to provide an initial payment for the new provider's services.

## STEP 5: GIVE YOUR OLD PROVIDER NOTICE

Now that you know you are transitioning, follow the procedures in your previous contract to end that relationship. Depending on how you expect the MSP to take the news, you might tell them earlier. It is useful when the old and new providers can work together to ensure a smooth migration.

You don't have to handle the notice yourself. Your new MSP can do so for you. This can be useful, as it takes a task from you. Also, it can facilitate conversations between the two providers about the transition.

## STEP 6: SCHEDULE OFF-BOARDING

This is another job for the new MSP, ideally working with the old MSP. This involves:

- removing the old MSP from your network;
- uninstalling their monitoring software;
- deleting their logins and shutting down accounts;
- turning over any needed information to the new MSP;
- returning hardware to the old MSP (there may be an uninstallation fee, so look for that in your contract too).

Most MSPs will plan this off-boarding for a time when your business is less busy – perhaps Friday evening after business hours. The goal is to have as little impact on your day-to-day as possible.

## STEP 7: START ONBOARDING

Expect the new MSP to want to start onboarding as soon as off-boarding is complete. This minimizes your downtime and helps make the transition easier.

Some onboarding can start the same day as off-boarding. Your new IT partner will:

- install any new software;
- bring in and install the new hardware;
- confirm your old MSP removed everything under their control from your network;
- change all access codes that allowed your old MSP into the system;
- provide you with the new logins;
- perform a full data backup;
- update any software that needs it and set up patches and fixes as needed.

## STEP 8: TRANSITION YOUR EMPLOYEES

Once onboarding is done, your MSP will still have work to do. They need to help your employees get used to the new IT environment.

Expect the provider to have someone on-site to meet and train employees. They can train up your employees and support any migration needs. The MSP may also work for a time with your previous MSP to co-manage services to ensure all goes smoothly.

Once your employees know your new IT, the only remaining step is to adapt to your new MSP.

## WORKING WITH A NEW MSP

So, there you have it: switching MSPs in eight steps. It's not all simple, we'll admit that, but now you know what goes into the transition. Plus, you've seen that there are many steps that you don't have to do yourself.

Not satisfied with the service from your current MSP? We can help. Transition with us. Contact our experts today for a free consultation at 416-900-6852 or [hello@vbsitservices.com](mailto:hello@vbsitservices.com).





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