



The Ultimate Checklist for Switching IT Providers

A fill-in planning table to help you switch IT support without the headaches.

Company Name: _____

Prepared By: _____ Date: _____ Target go-live date: _____

Checklist questions

Confirm your exit path

What does our current agreement say about notice periods, offboarding terms, and auto-renewal?

What services are we using today that must not be left behind?

Your answer	Notes / next steps	Status
		<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Done

Inventory your “keys to the kingdom”

Do we have admin access (and know where it is stored) for Microsoft 365, our domain registrar,

DNS, email filtering, backups, firewalls, and any line-of-business apps? If not, what is the plan to regain control?

Your answer	Notes / next steps	Status
		<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Done

Tip: Keep access and documentation under your company's control. A smooth transition is usually the one where the planning felt boring.



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Collect what already exists

What documentation do we already have, and what have we requested from our current provider (network Diagrams, device list, warranty info, vendor contacts, password vault exports, backups details, etc.)?

Your answer	Notes / next steps	Status
		<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Done

Choose a go-live date that respects your calendar

What date are we aiming for, and what business-critical weeks should we avoid (payroll, filing deadlines, major events, busy seasons)?

Your answer	Notes / next steps	Status
		<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Done

Make access changes in the right order

What is our step-by-step plan for credential transfer, verification, and validation before we revoke the outgoing provider's access?

Your answer	Notes / next steps	Status
		<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Done



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Set expectations for how support will work on day one

How will staff request support, what counts as “urgent,” and how will updates be communicated (email, phone, portal, support agent)?

Your answer	Notes / next steps	Status
		<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Done

Ask questions that reveal how the new provider operates

What monitoring is included? How do they document environments? How often do they review security?

What does the first 30 days look like? How do they offboard and return documentation if we ever part ways?

Your answer	Notes / next steps	Status
		<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Done

Request an onboarding roadmap, not a sales promise

Do we have a written onboarding roadmap that covers discovery, documentation, monitoring setup, security baselines, and a realistic improvement plan with timelines and responsibilities?

Your answer	Notes / next steps	Status
		<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Done