HOW TO ENSURE A SUCCESSFUL TRANSITION TO CO-MANAGED IT

STEP 1

Evaluate Multiple Providers



- 1. Evaluate at least 3 providers.
- 2. Go visit their office.
- 3. Ask to speak with an engineer rather than just salesperson/owner.
- Always get at least 3 references.

STEP 2

Clearly Define Outsourced/Augmented IT Role Before Agreement Begins

An in-house/outsource partnership is not only common, but growing in popularity. This combination will require the company leadership, in-house IT, and outsourced IT to set clear expectations of roles.

Here are some examples of outlining outsourced roles:



- 1. Server Management: Changes made to the server, security audits, updates, and migrations are done by the MSP.
- 2. Backup and Disaster Recovery:
 The MSP manages the data

backups onsite and offsite. They monitor, test restore, and all the other plethora of items associated with data redundancy.

3. Level 1, 2, or 3 Help Desk:

Outsource lower level or higher-level help desk tickets to the MSP.

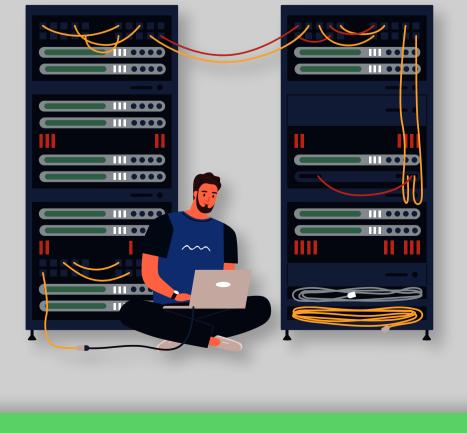
STEP 3

Onboarding

This is a critical part in the process and will set the tone for the rest of the relationship.

Factors to consider:

- Is there a clear timeline and expectation for onboarding?
 Did they meet or exceed this expectation?
 Were you informed and comfortable with every step in
- 2. Were you informed and comfortable with every step in the 3. process?
- How is the communication during onboarding?
- 5. Did the provider provide excellent recommendations to
- improve your workflow?



If the onboarding is smooth, communication is on point, recommendations are helpful, and the timeline is met, then congrats! You've found the right Co-Managed IT Firm.

