



Switching IT Companies

Changing IT providers doesn't have to be chaotic or painful. When approached with the right preparation and a clear plan, it can be a structured, low-disruption process that strengthens your technology, security, and long-term stability.



Use this guide to understand what to do and what to expect when transitioning to a new IT provider.

1 Internal Preparation

- Communicate the change to employees early
- Set expectations for how support will work during the transition
- Assign one internal point of contact to manage the transition

2 Environment Review

- Inventory hardware, software, cloud services, and key vendors
- Review your current IT contract and termination requirements
- Confirm ownership of hardware, licenses, and cloud accounts, and alert your new provider to any hardware or tools that will need to be re-established during the transition
- Gather existing documentation, credentials, and vendor details

3 Onboarding Execution

- Expect onboarding to happen in phases, not all at once
- Review timelines, milestones, and responsibilities with the new provider
- Communicate support process changes to employees
- Validate access to systems, applications, and files
- Test data migrations and business-critical applications

4 Early Security Review

- Review user and administrative access
- Confirm security tools and monitoring are active
- Apply critical updates and patches

5 Vendor & Application Handover

- Identify software licenses and renewal dates
- Review cloud platforms and third-party tools
- Account for hardware warranties and service agreements

6 Ongoing Partnership

- Allow time for stabilization in the first few weeks after onboarding
- Establish communication and escalation paths
- Shift from reactive support to proactive planning
- Revisit expectations as the business evolves

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