

Dear Reader,

We wanted to share our on-boarding documentation because we see so many frustrated businesses, let down by poor preparation and management of a migration from an internal IT Team, or incumbent MSP to a new provider, which results in a poor relationship from the outset.

Here is our list of items which must be considered when moving between IT providers – this is based on a company using Microsoft Office but the same will apply for alternative suites.

| Section 1: Accounts | |
|---|---|
| 1 | Create/Obtain logon details to Office 365 Tenant from current provider with Global Admin permission |
| 2 | Create/Obtain logon details to Public DNS / Domain Registrar with Admin permissions |
| 3 | Obtain logon details to all Office Network Devices (Routers / Firewalls / Switches / Access Points etc) |
| 4 | Create/Obtain logon details to printers |
| 5 | Create/Obtain logon details to AWS (if applicable) |
| 6 | Create/Obtain logon details to third party data hosting platform (if applicable) |
| 7 | Grant 'Owner' access to new account with all Azure Subscriptions (if applicable) |
| 8 | Create/Obtain logon details and sign-in URLs to any Backup Platforms |
| 9 | Create/Obtain logon details to Ticketing Systems (if applicable) |
| 10 | Create/Obtain logon details to any Databases (i.e. SA) if applicable |
| 11 | Create/Obtain logon details to any other equipment which needs supporting |
| Section 2: Information verification | |
| 1 | Obtain list of all site locations / Primary Contact(s) for the site / telephone number(s) |
| 2 | Obtain full list of all users (names / Email Addresses / Permissions / Assigned device(s) |
| 3 | Verify Domains which are linked to the Office 365 Tenant and associated Domain Registrar accounts |
| 4 | Verify default design(s) of workstation image for users |
| 5 | Obtain any Software installers / License Keys (if applicable) |
| 6 | Obtain contact details for third parties required for IT support of key services (if applicable) |
| 7 | Verify Permissions Matrix for Support Helpdesk (Approvals / accessing resources / requesting things) |
| 8 | Verify any ongoing issues with the infrastructure (if applicable) |
| 9 | Verify existing MSP has been served notice |
| 10 | Verify if communications are allowed with the existing MSP and if so, obtain contact details |
| 11 | Verify Termination Date with the existing MSP / Go Live Date |
| 12 | Verify if any SSL Certificates are in used for any websites and if so, do they need to be monitored (if applicable) |
| Section 3: Hardware | |
| 1 | Verify List of workstations Make / Model / Serial Number / Warranty info / Location |
| 2 | Verify list of Router(s) - Make / Model / Serial Number / Warranty info / Location |
| 3 | Verify list of Firewall(s) - Make / Model / Serial Number / Warranty info / Location |
| 4 | Verify list of Switches - Make / Model / Serial Number / Warranty info / Location |
| 5 | Verify list of Wireless Access Points & Controllers - Make / Model / Serial Number / Warranty info / Location |
| 6 | Verify list of Printers - Make / Model / Serial Number / Warranty info / Location |
| 7 | Verify list of any other equipment which needs supporting |
| Section 4: Internet & Internet Service Provider (ISP) | |

| | |
|---|---|
| 1 | Verify who internet Service Provider is |
| 2 | Verify Broadband details (Type of service / Type of connection) |
| 3 | Verify if Internet connection is using a Dynamic or Static Public IP. If Static, confirm the IP / IP Range(s) |
| Section 5: Licensing & Subscriptions | |
| 1 | Verify licensing subscription requirements (Type / qty / payment method - PAYG / NCE) |
| 2 | Verify if any Azure subscription are in place and if so, does this need to be migrated |
| 3 | Verify if the Office 365 subscription which are in place need migrating, if so types/qty and date the existing MSP will terminate |
| Section 6: Networking | |
| 1 | Verify if there are any existing Network Diagrams which can be provided |
| 2 | Verify the Wireless SSIDs for the Network |
| 3 | Anything to be aware of regarding the Network (problems) |
| 4 | Obtain Pictures of location / Offices / Comms Rooms / Meeting rooms etc |

Proxar IT have successfully on-boarded many new clients over the past few years. Our attention to detail and preparation has been key to that success.

The above list should be used as part of a conversation about the migration, as there will be aspects that may not be understood, and areas which need a discussion of best way to move forward.

Can improvements be made during the migration?

Is the current setup fit for purpose, and for the next few years?

What pain points are being experienced?

Any incumbent MSP should understand why they are not delivering, and from a professional ethos, assist with their off-boarding process. Its vitally important that the existing IT team are cooperative in the process.