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.
4. 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:

1. Is there a clear timeline and expectation for onboarding?
2. Did they meet or exceed this expectation?
3. Were you informed and comfortable with every step in the process?
4. How is the communication during onboarding?
5. Did the provider provide excellent recommendations to improve your workflow?
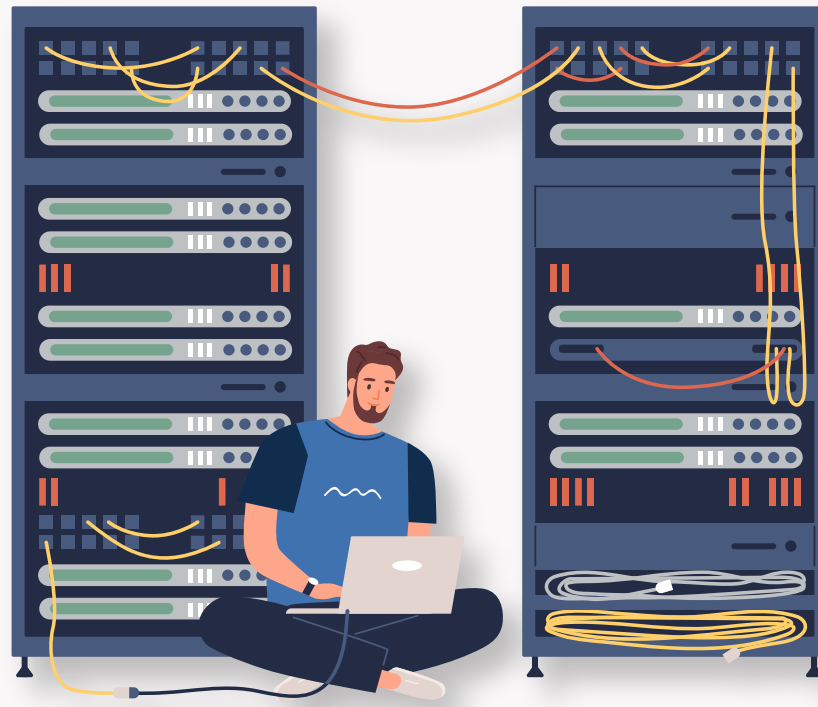
If the onboarding is smooth, communication is on point, recommendations are helpful, and the timeline is met, then congrats! You've found the right Co-Managed IT Firm.

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