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SWITCHING BUSINESS TECHNOLOGY PROVIDERS: WHAT YOU NEED TO KNOW

Learn how to make a smooth transition to a new IT or print provider with these tips, tricks, and checklists.

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Is it time to say goodbye to your business technology provider?

Goodbyes are never easy, but sometimes they're necessary. If you've been putting up with slow response times or reactive service from your business technology providers, it's time to make a change. Technology is a powerful tool for business growth – you deserve a service provider who will help you leverage it to hit your goals and improve your business.

Maybe you feel neglected by your IT provider or you're not confident in their ability to protect your business from the latest cyber threats. Perhaps you're tired of waiting days for your printer to be fixed. You might even suspect a better provider would prevent downtime in the first place. In the end, you're frustrated that you're paying for a service that simply doesn't live up to your expectations. And you deserve better.

Whether it's your managed IT service provider (MSP) or print provider that's causing you headaches, this guide has you covered. In the first section, we'll explore questions to ask prospective IT providers, followed by a handy checklist and tips for a seamless transition between providers. If you're looking to change print providers, head to the second section to find out how to switch smoothly and securely.

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2 How to switch IT support seamlessly

Slow response and resolution times, a reactive approach, unpredictable costs, and a lack of knowledge or resources are all valid reasons to switch IT support. You need a service provider who will keep your business secure and operational, while leveraging technology for growth and success. Here are some questions to ask prospective providers to ensure you get just that.

2.1 Finding a new IT provider: 6 Questions to ask

When you're vetting new IT service providers, it's important to set clear expectations from the outset. Be prepared to ask them the following questions.

How mature is their company?

In the world of IT, there's no replacement for industry experience. An MSP that has been in business for many years will have a high operational maturity level, meaning smooth service, tried and true solutions, and reduced security risks. They are also likely to have a sizable team of knowledgeable IT professionals who can guide you to make smart technology investments. Beyond years in business, maturity can be measured in industry accreditation, and client retention and satisfaction. Don't be afraid to ask to speak to one of their existing clients. This gives you the opportunity to learn more about the MSP from a customer perspective.

2.1 Finding a new IT provider: 6 Questions to ask

How will they address your existing pain points and help you achieve your goals?

By voicing your concerns and expectations from the start, you can assess a prospective IT provider's ability to alleviate your problems and help you achieve your objectives. Highlight the issues you're experiencing with your existing provider, and give your potential future provider the chance to explain how they would do things differently.

What are their response and resolution times for support requests?

It's easy for IT providers to claim that they offer great service, but their response and resolution times are a simple way to prove it. A good provider will answer support requests quickly and have a high first-time fix rate. They should also commit to these in their contracts and service level agreements (SLA).

What proactive measures do they take?

Great IT support goes beyond reacting quickly to help desk requests. Your IT provider should maintain your hardware proactively by routinely applying patches, taking extensive cybersecurity precautions, monitoring your network, maintaining regulatory compliance, testing your data backups, and developing disaster recovery protocols to ensure you're prepared for anything. All of these measures will improve your security, reduce downtime, and support business continuity in the event of a breach or disaster.

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2.1 Finding a new IT provider: 6 Questions to ask

Do they rely on outsourcing?

Less-established MSPs tend to rely on outsourcing for complex tasks like cybersecurity and IT infrastructure. Although it can be useful to call on outside experts, bringing in third parties can result in delays, lack of accountability, and greater potential for supply-chain security breaches. It is preferable to find an IT provider with the staff and expertise to handle all your needs in-house.

What is their transition process?

To make a smooth transition between providers, planning is essential. A good IT provider will have an established IT transition plan in place. They will be able to guide you through the process and take the burden off your shoulders so you can continue to run your business with as little disruption as possible. They should also be transparent about their offboarding process, so you are confident you won't be trapped in a contract with them if it doesn't work out.


By asking the above questions, you can find an experienced provider who is able to resolve your IT pain points, keep your data secure, and help your business grow. Once you've found your perfect provider, it's time to kickstart the offboarding process.

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2.2 Your IT transition plan: A checklist for leaving your existing provider

In most cases, your existing IT provider will liaise with your new provider to ensure a smooth hand over. However, in some cases, you might face resistance from your current provider. Whether the split is amicable or not, it's important to have oversight of the process in case anything important is overlooked – ultimately, it's your business on the line. Avoid leaving things until the last minute. By taking a proactive and timely approach to the transition, you can ensure nothing is missed or rushed.
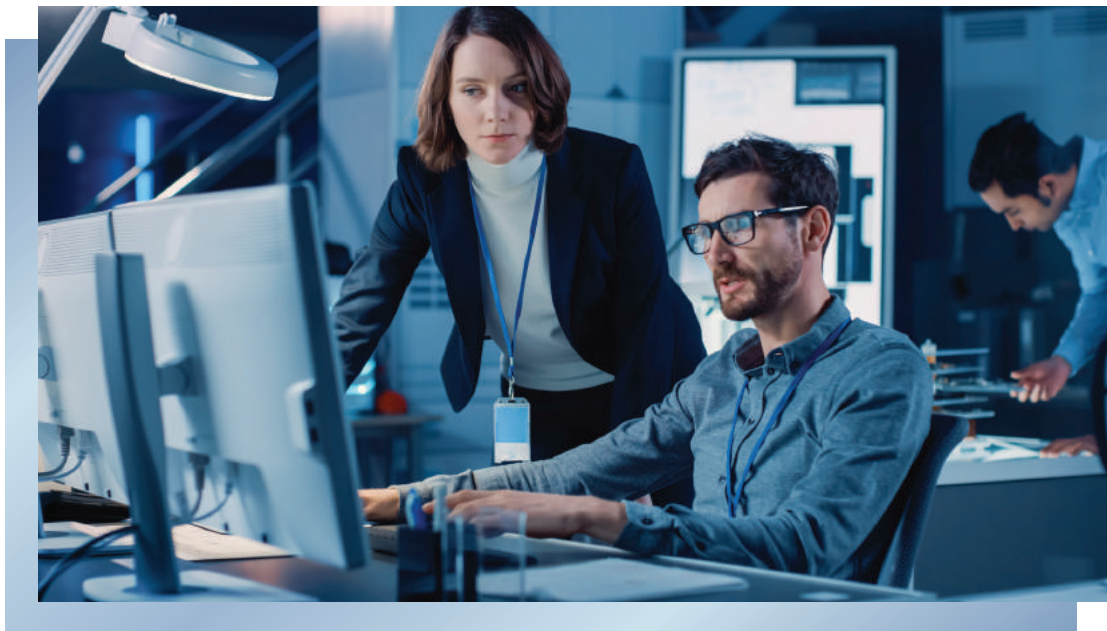
Follow this offboarding checklist to ensure everything is accounted for.

☐ **Check your contract:** First of all, check the contract with your existing IT provider for an out-clause or required notice period. Regardless of this, you should aim to give at least 90 days' notice to facilitate a smooth transition.

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2.2 Your IT transition plan: A checklist for leaving your existing provider

☐ **Document all facets of your network:** It is essential that you have all the information you need to continue running your business when your IT provider leaves. If you are on bad terms with your provider, you should gather documentation before giving them notice. Be sure to document the following:

▽ **Networks and configurations:** Login credentials, software licensing keys, software portal, encryption keys, cloud portals, network diagrams, hardware inventories, and DNS information

▽ **IT issues history:** Current, known, and resolved IT issues – so ongoing problems can be understood and resolved swiftly

▽ **Policies and processes:** Roles and responsibilities of internal and external IT staff and vendors, including schedules and who is responsible for patching, maintenance, cybersecurity, compliance, training, and onboarding and offboarding employees.

▽ **Data backup protocols:** How and when data backups take place, where they are stored, and when they are tested.

▽ **Disaster recovery:** Protocols for responding and recovering in the event of a data breach or disaster.

2.2 Your IT transition plan: A checklist for leaving your existing provider

☐ **Coordinate transition:** Establish a time when your existing and new IT providers are both available to offboard and onboard simultaneously. Ideally, this should be outside of your own working hours to ensure minimal disruption. The offboarding part of this process includes:

▽ **Uninstalling software** that belongs to your old provider

▽ **Removing equipment** that is owned or leased by your old provider

▽ **Securely sharing all documentation** with your new provider. Access controls and encryption can be used to ensure documents are protected.

Once all of these steps are complete, you can focus on making a smooth transition to your new provider.

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2.3   How to make a seamless transition to a new IT provider

In preparation for the transition, your new provider will audit your existing IT environment. This helps them to determine your needs, identify appropriate technology and service recommendations, and set the price of their service. During this process, it is important to set clear expectations with your new IT provider.

Communicate your existing pain points, business goals, and the level of service you require from them. For example, do you expect helpdesk calls to be answered immediately or returned within 15 minutes? Once a request has been submitted, how quickly do you expect the issue to be resolved? By defining maximum acceptable periods of downtime from the start, you can hold your provider accountable if problems arise.

By including your employees in this process, you can take the opportunity to address ongoing issues that are impacting productivity and morale. Ask them about their pain points and seek solutions with your new provider. If your workforce feels heard, they are more likely to be accepting of any disruptions faced during the transition, and of the new IT provider itself. In addition, you should let your employees know why you're switching, who the new provider is, and how their day-to-day work will be affected. Provide clear instructions on how to engage the new provider for support and services, and outline the response and resolution times that you have agreed on.

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2.3 How to make a seamless transition to a new IT provider

A rushed transition will rarely be seamless. For this reason, you should set a timeline with your new service provider that allows plenty of room for testing and adjusting new processes and tools. Again, you can involve your employees in this testing process – as they are the ones who will be using these tools and processes on a daily basis, they can provide invaluable feedback. Your timeline should also account for employee training to ensure new technologies and processes are fully utilized.

Now, let's explore how to switch to a new print provider.

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3

How to switch print providers seamlessly

When your printer goes down, it can bring the entire office to a standstill. An unresponsive print service provider can cause further costly downtime and missed deadlines – and troubleshooting printers yourself distracts you from your core duties. Slow response times aren't the only reason to switch providers. If your current print company neglects proactive maintenance, it's likely that you will experience issues with your printer/copiers more often than is necessary.

Even if you receive timely service from your print provider, there may be other issues causing you to rethink your partnership. Perhaps you're not confident that they're taking the necessary cybersecurity precautions – with internet-connected printers now classed as endpoints on your network, security is a growing concern. Or maybe you're constantly left with too little toner, leading to frustrating downtime – or too much, meaning unnecessary expenses. Further financial hits can come in the form of services or copies bundled into your lease agreement, meaning you pay for items you don't use.

Whatever your reasons for switching print providers, here are some essential questions to ask prospective companies to ensure you get the service and inclusions that best meet the needs of your business.

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3.1 Finding a new print provider: 8 Questions to ask

When you're vetting new print providers, it's important to understand their lease agreements and set clear expectations from the outset. Be prepared to ask the following questions:

How will they tailor your printer/copier solution to your needs?

To ensure you get the correct equipment, your new provider should carry out needs sizing for your print volume, media types, finishing requirements, and scanning requirements. Any provider that suggests simply carrying over your existing equipment is not committed to finding the best and most cost effective solution for you.

Can they integrate with your existing systems?

As printers become increasingly connected, it's important to find a solution that works with your current software and systems. For example, application integration can enable you to scan directly to your cloud application, mobile phone, or email to save time.

Are support, maintenance, and copies bundled into their lease agreement?

While you should aim to get a deal that covers equipment hire, support, and maintenance, it is preferable to separate these services into different contracts. This gives you greater freedom to end your lease early without being tied to added costs. The same goes for copies: Beware of lease agreements that bundle these in, as you risk losing out if the copies aren't used or if you exit your contract early – many businesses were caught out by this during the COVID-19 pandemic and ensuing office closures.

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3.1 Finding a new print provider: 8 Questions to ask

What is their billing model?

Beyond your equipment lease, it is important to understand which billing model will be used for services to avoid getting caught out by unseen or unpredictable costs. Typical options include fixed rate, which sees you charged a flat monthly rate for services; monthly minimum, which requires you to hit a minimum cost or make up the difference; cost-per-click, which involves paying for services based on the number of pages you print; and transactional, which entails being charged per service.

What is their standard response time and first-time fix rate?

A good managed print service provider will set clear guidelines for how quickly clients can expect a response to support requests and how likely it is that issues will be resolved first time.

What proactive security and maintenance measures do they take?

It's not enough for a print provider to simply react to problems when they occur. They should be monitoring your equipment for technical and security issues, carrying out routine maintenance to minimize the chance of downtime, and taking proactive steps to secure your equipment from security threats. This should include encrypting the storage on your copier, enforcing access controls, deploying endpoint protection, and more.

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How will they manage your printing supplies?

The best print service providers will have systems in place to ensure you never experience downtime due to a lack of printing supplies. Some companies provide automated meter reading and toner replacement. This just-in-time approach means you're never left without toner, nor are you billed for supplies you don't need.

What is their transition process?

Some managed print companies will assist with the transition from your old provider. When it comes to offboarding, they should coordinate with your existing provider to install the new equipment on the same day that your old equipment is removed. They may even wipe and return your old copier for you. They should also be transparent about their offboarding terms and process, so you are confident you won't be trapped in a contract with them if it doesn't work out.

By asking these questions, you can find a reliable print provider who offers transparent billing and responsive service. Once you've found your ideal print service, it's time to offboard from your current provider.

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3.2 Switching print services: A checklist for leaving your existing provider

Many businesses switch print providers because they are unhappy with the terms of their contract – it may rollover automatically without warning or have excess copies or services bundled in. If this is the case for you, you'll need to be prepared well in advance to cancel your contract within the agreed timeframe. It is also important to check whether your lease and service agreements are separate, as they may have different terms. To ensure the offboarding process goes smoothly, follow this checklist.

☐ **Check your lease and service agreements for:**

▽ **Automatic renewal policy:** Avoid getting trapped in another cycle of your rolling contract by cancelling before it automatically renews.

▽ **Cancellation notice period:** Some providers require upwards of 90 days' notice for cancellation, so it pays to be prepared in advance.

▽ **Termination fees:** If you plan to exit your contract early, be prepared to pay additional fees.

▽ **Performance clauses:** If you believe your print service provider failed to fulfill your requirements, they may be in breach of contract. This could allow you to exit your contract early or waive cancellation fees.

▽ **Equipment return policy:** Establish whether you will be responsible for returning your leased equipment.

▽ **Property tax:** Check who is responsible for paying personal property tax on your leased equipment. If you are billed separately for tax, you may be eligible for reimbursement or liable for additional payments.

3.2 Switching print services: A checklist for leaving your existing provider

☐ **Notify your provider:** Be sure to cancel your contract according to the stated terms or be prepared to pay the associated fees.

☐ **Check your new provider's terms:** When you switch print companies, your new provider might be able to assist you with your returns. They might also offer a lease buyout in case you want to exit your existing contract early.

☐ **Wipe your leased equipment:** Before returning your printers/copiers, ensure all data and settings are wiped from the hard drives to protect your private information.

☐ **Return your leased equipment:** Whether your current provider is collecting their equipment, your new provider is returning it for you, or you are responsible for returning it yourself, try to do it on the same day as your new provider starts and be sure to get proof of delivery.

Once you have completed these steps, you can concentrate on making a smooth transition to your new print provider.

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3.3   How to transition smoothly to your new print provider

In preparation for the transition, your new print provider should assess your print, scan and copy needs. This will help them to customize your equipment based on your current needs and include the necessary services in your contract. It's important to set clear expectations for your lease and service agreements so you don't run into the same problems as before. Be sure to ask about their notice period, maintenance and response times, and billing model.

Ask if your new provider can help return your old equipment and install their equipment on the same day. Ideally, this should be done outside of office hours to minimize disruption. Once your new equipment is installed, make sure your employees know how to use it – your provider should be able to provide staff training sessions and guides. You should also communicate your agreed help desk support process and policies, and inform your staff of the maintenance schedule so they can plan their printing needs accordingly.

4   Ready to implement your IT transition plan?

Now you know how to find the ideal IT and print providers, and how to navigate the transition to a new service provider, you're ready to make the switch. If you're looking for a one-stop solution, we can deliver all your IT, print, and infrastructure needs in one service package. We'll manage and optimize your IT and print environments so you can reduce costs, increase productivity, and maintain cybersecurity. To find out more about our comprehensive services, contact us today.

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