



**A Better Business Starts with a Better
IT Partner**

**FAQ:
Switching IT Providers**

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Do you dream about ditching your current IT provider? Do they leave you hanging? Are you only staying with your current IT provider because you are intimidated by the switching process?

We've created this FAQ as a starting point.

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MOST COMMON QUESTIONS ABOUT SWITCHING IT PROVIDERS

Switching IT providers is a big decision. As with most big business decisions, switching IT providers should not be taken lightly. The process can take time and research. But, consider the importance of technology to your business and how your current IT provider may be holding you back.

It is challenging to work with an IT company that doesn't deliver. Your technology infrastructure is the foundation that everything else runs on. You want that foundation in the most competent hands.

We have handled lots of transitions. We know how the process works and how to ensure a smooth migration.

If you've come to the point where you've realized your current IT partner isn't a good match for your business, but are putting off the switch because you don't know how to start, we've got you.

These are some of the most common questions we get asked by the clients who come to us for help. If you still have more questions or want to talk about switching, reach out to us at (617) 369-9977.

Q. How do I know if it is time to switch IT providers?

A. If you are reading this, you probably already suspect it's time to switch. Maybe you're unhappy with the customer service you've been getting, or you've realized there are more affordable solutions out there. It could be that your current IT provider just isn't a good fit.

Your IT provider should be delivering true business outcomes that drive your business forward. If your provider isn't delivering tangible business results, what benefits are they bringing?

Because your business is continually evolving, your provider should be championing that evolution and finding new ways to solve your biggest business challenges.

Mutual trust is essential. You should be able to trust your IT provider to care about your business as much as you do. You work hard to develop your business, you deserve an IT partner who values you and the goals of your business just as much as you value the work they do for you.

The team at Prosper Solutions is committed to helping you do business better. As relationship builders, we want to work with customers who will be with us for the long haul. This means taking the time to understand your business goals, expectations, and company culture to make sure we are a good match.

Q. Should I stay or should I go?

A. The pandemic provided an opportunity for IT providers to shine. Unfortunately, not all businesses had the benefit of an IT provider that excelled at smoothing the work from home transition and dealing with all the other challenges of doing business during a global pandemic. If your IT provider left you hanging, then you can do better.

Prosper's clients were well supported during the pandemic. We were there for them and their staff during the sudden shift to remote work. Whether it entailed setting up an entire team with new laptops so they could stay productive and secure while working from home, or enabling communication tools so organizations could securely connect with each other, Prosper ensured their clients stayed up and running during the Pandemic.



If your current provider checks any of these boxes, then it is time to seek new IT help:

- They failed to transition your team to remote work in a timely and efficient manner and/or support remote workers properly during the Pandemic
- They don't offer the cloud or cybersecurity tools needed to make remote work effective and secure
- They are slow to respond to support requests
- They aren't able to solve problems quickly
- They lack vision and strategy
- They can't meet your IT and security needs or don't follow security best practices
- They won't accept responsibility
- You don't trust them
- They don't understand your business goals
- You have outgrown them
- They are falling behind on tickets and aren't meeting SLAs
- They focus solely on break/fix and aren't helping with IT strategy
- The bills get higher and you are paying for things you don't need

Maybe you just not happy with them, that is enough of a reason to switch. Whatever you decide, switching providers takes time. If you are struggling with your current provider, don't wait until you are desperate. Start the vetting process now.

We'd love to talk to you about how Prosper Solutions can add value to your business. As a process driven company, we've got a system in place to help determine whether we'd be a good fit. Reach out to us and let's schedule some time to get to know each other.

Q. How do I find a new partner that meets my needs better than my current IT provider?

A. Technology plays a vital role in your business, which is why it is so important to work with an IT partner that aligns with your business. Look at this process as an opportunity to partner with an IT provider that will do more than just fix things. A good IT partner can, and should, help transform and elevate your business.

Some points to consider:

- Take the time to learn from you past experiences. Weigh the pros and cons of your current provider, and identify the technological issues and priorities of your business.
- Your IT provider should know how to use technology as a strategic advantage and add value to your company. If they define IT support as simply fixing things when they break, they aren't doing much to add value. If they define it as keeping systems running and always in peak performance, they are worth consideration. If they define their role as keeping things running, always in peak performance, and backed by an ongoing strategy to help you transform and elevate your business, you've found a keeper. Bonus points if the IT provider is familiar with your industry.
- Cybersecurity should be a priority. If they aren't putting cybersecurity at the core of everything they do, then keep looking.



- Your new provider should be able to meet your current needs as well as support your needs and goals as your business matures.
- Look for a provider who is able to engage for the long term, one who is interested in building a relationship with you, not just adding you to their roster of clients.
- Before you commit, do a compatibility check. Take the time to get to know a little about each other to make sure you are well matched. Share your business' goals and mission so they can get a better understanding of your company values. Be clear about your expectations and budget.
- Ask for references. Everyone claims they are committed to your success, look for a provider with the references to back up those claims.
- If you like what you hear, and decide to move forward, consultation is the next step. This is when the potential new IT provider takes the time to learn about you and your organization, and aligns expectations on how you'll work together to meet your goals.
- The IT provider should take time to understand your technology infrastructure and pain points to create a clear road map that outlines what is required to get you where you need to go.
- Their budgeting and quoting stage should establish clear priorities and expectations, outline both immediate and long term needs, and set budgetary parameters based on your requirements.
- The quote they provide should be clear and concise and include a scalable solution with clear deliverables. You should know exactly what to expect, how much you will pay, and have a clear vision of how you will work together to elevate your business.
- Finally, your new provider should have a comprehensive on-boarding process in place that outlines all the details involved in transitioning you over. Bonus points if they also have an off-boarding process, that shows they are truly a process driven company that has thought through all the steps in the client life cycle.

Prosper Solutions' client lifecycle journey includes a consultation stage to ensure that we clearly understand your business' needs and goals to determine if we'll be a good match. We'll help you understand the strengths of our processes and how our processes will bring value to your company and ensure that you are completely supported during the transition process.

Q. Will the process be difficult and lengthy?

A. Switching providers is a big deal, but it doesn't have to be a difficult process—as long as your new IT partner has experience transitioning clients, has a process in place, and has a strategy for ensuring a successful switch.

Switching strategically means that your new IT provider follows very a specific process to ensure a smooth transition. Process, needs, and expectations should be communicated in advance to be sure everyone is clear on what a successful transition looks like and how the transition will proceed. Your new provider should keep communication flowing and provide regular updates. They should be completely transparent on what they are doing and why they are doing it.

The on-boarding process will involve deploying and enabling the technology the provider will use to monitor and manage your systems, documentation, process alignment, remediation, and training. Trust your IT partner to lead the way. They've got a plan in place for strategically switching, If they don't have a plan in place, that is a red flag — keep looking for an IT provider who has a proven process for transitioning new clients and can clearly explain that process to you.

As a process driven company, Prosper Solutions is compulsive about documenting every detail. Our process alignment stage of on-boarding ensures clarity on how we will work together to meet your goals.



Q. Will the switch disrupt my operations?

A. Not as long as your new IT provider has a strategic plan for transitioning.

When it comes to your sensitive files or documents, your IT provider should have a well mapped out process to ensure they are secure throughout the entire process. Your new IT partner will work with your old IT provider to access all your secure logins and credentials.

Do not leave your old IT provider until your new IT provider is in place. A delay in service between your old provider and your new provider can open up your network to suspicious activity and related network disruptions.

When you partner with Prosper Solutions, we weave our processes with yours to ensure an effective collaborative experience. The purpose of this step of on-boarding is to provide consistency, and through that consistency, deliver value. The end goal is better coordination and collaboration and fewer disruptions.

Q. What can I do to help ensure a successful migration?

A. Transitioning to a new IT partner will take effort on the part of all involved: your staff, your old IT provider, and your new IT partner. Having well defined roles will keep things from falling through the cracks and make clear who is responsible for what.

Your new IT provider should have those roles clearly defined as part of their migration process. But, there are a few things you can do on your end to ensure a smooth transition.

- Do not cancel your current IT provider until you have found a new IT partner that meets your needs and has indicated they are ready to start the transition process. Once you know your contract term, you will inform your current IT provider you're switching. If you wish, you can have your new IT partner handle the phone call for you.
- It's beneficial to review your contract terms before canceling your services — you don't want to be left with cancellation fees in violation of contractual obligations.
- Make sure your current IT provider gives you administrative access to everything on your network.
- Be sure your new provider conducts an extensive security assessment to find any security gaps and backdoors that need to be locked.
- Meet with your entire staff to inform them of the change. Let them know the new contact information for getting support. They should also be updated on all policies and procedures related to the change.
- Your systems should be secured at every stage of the transition.
- Backup your files.
- Identify where your data is being stored and who owns your data.

Prosper Solutions will be your biggest advocates starting from day one. Based on the customized road map we develop for you during the on-boarding stage, we start putting into place the processes we've honed over the years. We worked hard to lay out best practices, train our talented team, and provide them with the best tools in the industry. Together, we'll grow and move forward.



Q. How do I deal with my existing IT partner?

A. Your current IT partner will have to be part of the transition process. We repeat — do not pull the plug on your existing partnership until your new IT provider informs you they've got everything under control.

Keep things friendly with your old IT provider, even if things get tense. They are an essential player in the migration process. Your old and new providers will work together to smooth the transition.

You can avoid negative backlash by sticking to an exit strategy. Be clear with expectations and keep everyone in the loop. You can always have your new IT provider handle communications with your old IT provider. Your new provider should have a clear plan for gathering documentation and all the additional information they need from your old provider.

Prosper Solutions has led many successful transitions, we understand that switching IT providers can be stressful. We take every step to ensure a smooth migration, this includes working with your outgoing IT provider when necessary.

Q. What challenges am I likely to encounter when switching?

A. A competent and capable IT provider will work closely with you during the switching process. Your new IT provider will do all they can to prepare for and mitigate any risks along the way, but it helps to know what to look out for:

Network downtime - Your new IT provider should have a plan in place to minimize network slowdown or downtime.

File loss or corruption - A capable IT provider will take every necessary step to eliminate the risks of data loss or misconfiguration.

A clear exit strategy and on-boarding process will make all the difference in smoothing the transition. The process will ensure that no details are overlooked and possible challenges are minimized.

Be patient. It may take a little time as you and your new provider get to know each other's process and systems.

As part of our consultation process, Prosper Solutions takes the time to do a deep dive into your systems to get a clear picture of your technology landscape. We want to know exactly what we are dealing with so we can determine what is required to get you where you need to go with as little turbulence as possible.

Q. What documentation will I need?

A. Prepare to give your new IT service provider the best possible start you can by sharing all the documentation you have. Documentation will help them become familiar with your systems quicker and ensure that disruptions are kept to a minimum.

Examples of documentation required for a successful transition:

- Network diagrams, design specifications, and standard configurations
- Network administrator usernames and passwords
- Employee account credentials
- Software and hardware inventories. Before you make the switch it is helpful to take an inventory of what products are yours and what belongs to your old IT provider. There might be some equipment that needs to be returned to the old IT company.
- An inventory of where your data is being stored and who owns that data
- Best practices
- Internal processes



Prosper Solutions considers documentation an extremely important component to ensuring a smooth, consistent transition, and delivering a systematic, organized way of managing your technology moving forward. We work very closely with our clients to get a complete picture of everything and everyone we are dealing with. Once we have a complete picture of the environment we are managing, we can begin the work of securing, alerting, maintaining, and updating.

Q. When do I inform my current IT provider of the intention to switch?

A. Do NOT cancel services with your current IT partner until you have found a new IT partner and they have informed you they are ready to start the transition. We understand you are looking forward to a more productive relationship with a new IT provider, but switching strategically requires following a process and letting that process play out as designed.

The new provider will take the lead and can handle communication with your old IT provider if things get tense. Prosper has handled many transitions and is happy to take the lead when dealing with your old IT provider — we know what is required and we speak their language.

Q. What do I tell my employees?

A. Like everything else during the transition, your new IT provider should have a plan for communicating with employees. It is vital that everyone is on board, from the C-suite, to employees, to vendors. Keep them informed of the process so they can do their part to ensure a successful migration.

Once you commit to the transition, go ahead and let your employees know of the switch. Your staff is one of the main project stakeholders and their participation is required.

Employees should be given clear instruction on who they should contact if they need help. You don't want employees becoming frustrated if they contact the wrong company for help during the transition.

If downtime is necessary, communicate that to your team in advance so they can plan accordingly.

People are a big component of our processes at Prosper Solutions. We take the time to align our company culture with yours to ensure a smooth experience for your entire staff and empower them with the proper tools.

Q. Will new training be required?

A. Training will help keep your team in the loop and ensure they know how to get help. Schedule IT training sessions as soon as possible so your team can get familiar with new applications and cybersecurity rules.

Prosper Solutions believes that knowledge is power. We customize trainings specifically for each client. As part of our on-boarding process, we'll spend time training you and your staff on how to use the Prosper Portal to create and track support requests, access applications, view trainings and alerts, and more.

Q. Do I need to inform my vendors?

A. Yes. Don't forget about your vendors. Like your employees, they need to be kept in the loop. This should be a part of your new IT provider's strategic transition plan. Part of the on-boarding process includes compiling contact information for your current technology vendors—from your ISP to your application vendors.

Your new IT provider should do most of the heavy lifting when it comes to working with vendors through the transition. But, you may need to authorize your new IT partner to act on your behalf and to remove the old IT provider from contacts. If your new IT provider isn't authorized to open a support case with a vendor on your behalf, that could lead to delays.

Prosper Solutions works with your vendors during the transition process to ensure a coordinated migration.



Q. How can I ensure my new IT provider meets my expectations?

A. Be very clear about your expectations — and include those expectations in the new SLA

Many IT support contracts have KPIs (key performance indicators) or SLAs (service level agreements) in place that define service expectations. Your new provider should stick to those performance agreements. These defined metrics will help you judge whether you are getting the service you signed up for.

As in most relationships, communication is key to a healthy relationship. If something seems off, you should feel free to speak openly about the problem and give the new IT provider time work out the kinks. Stewing in silence will not solve any issues.

A key component of our client lifecycle at Prosper Solutions includes regular check-ins. We are deeply committed to providing an awesome customer service experience. We encourage open communication and honest feedback in order to build and strengthen our collaborative relationship.

Q. What is a Managed Service Provider?

A. Managed Service Providers or MSPs handle the day-to-day-management of your technology so you don't have to do it yourself. Typically they do more than just fix things when they break, they take over the responsibility of making sure your technology systems stay up and running in addition to providing priority access to technology support, cybersecurity services and technology guidance.

The benefits of working with an MSP are substantial. From cost savings — MSPs tend to deliver IT services for less money than internal IT departments can — to having access to technology expertise that can truly transform your business, most businesses see great value in partnering with an MSP.

The specific services included as part of a Managed Services agreement can vary between MSPs and typically include:

- Remote monitoring & management of your network
- Technical & help desk support
- Technology & device training
- Cyber security solutions & cybersecurity awareness training
- Virus protection
- Data backup & disaster recovery
- Business continuity
- Technology road mapping & planning
- Virtual CIO
- Compliance
- Cloud services

Look for an MSP that will not only manage your technology, but also serve as a trusted technology advisor to your business. Find an IT partner that looks for ways to use technology as a strategic advantage and finds creative ways to help tackle your biggest business challenges.



At Prosper Solutions, our client lifecycle is focused on optimizing your customer experience and helping you reach your goals. From the initial consultation and on-boarding, to business elevation and off-boarding, we have processes in place to ensure a successful engagement during every step of our journey together.

If you are ready to take that first step toward switching IT providers, reach out. Let's meet and get to know each other. As part of our consultation process, we take the time to discuss your business goals and expectations to determine if Prosper Solutions would be a good fit. This process ensures a mutually-beneficial engagement. As relationship builders, we want to work with customers who will be with us for the long haul.

Together, we will map out a path to get you to your goals and we'll help you clearly understand the actions required to reach your goals. We'll work with your budget to establish needs and priorities and plot our path forward around your requirements.

When you partner with Prosper, you will know exactly what to expect, how much you will pay, and have a clear vision of how we will work together to elevate your business. Don't worry. We are experts at this. We have a process in place to make the switching process easy. Contact us today at **(617) 369-9977**.



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