

THE KR GROUP'S MSP ONBOARDING CHECKLIST



Thinking of changing your managed IT services provider (MSP)? We want to help! Here's a checklist to guide you through the process:

Complete an audit with your prospective MSP

- Make a list of owned and leased IT equipment
- Make a list of known antivirus, anti-spam, and anti-malware software
- Receive a statement of work from the prospective MSP

Notify your current MSP of your departure

- Check if your contract requires an advanced notice
- Contact your current MSP and notify them of your cancellation
- Schedule a time for your current MSP to off-board
- Inform your new MSP of off-boarding time and coordinate onboarding

Off-board old MSP and onboard your new provider

- Your old MSP removes old hardware and software
- Your new MSP installs new hardware and software
- Your new MSP backs up your system
- Your new MSP conducts a brief security assessment
- Your new MSP is available for questions

For more information about starting a new managed services contract, check out:

- ["4 Qualities to Look for When Hiring a Managed IT Services Provider"](#)
- ["How to Switch to a new Managed Services Provider \(MSP\)"](#)
- ["Pros and Cons of Managed IT Services Contract Lengths"](#)