

Roles & responsibilities checklist for a successful transition

OUTGOING MSP	INCOMING MSP	DATE
--------------	--------------	------

A successful MSP transition depends on all three parties – the incoming MSP, the client (your organization), and the outgoing MSP – fulfilling defined responsibilities. Use the checkboxes below to track completion as each item is finished.

Staging the transition

Where possible, all parties stage the transition instead of flipping every service live on the same day. End-user-facing services go last.



1 • DOCUMENTATION

2 • TOOLS & BACKUP

3 • HELP DESK (LAST)



Incoming MSP responsibilities

- ☐ Coordinate and work with/manage third parties (Microsoft, outgoing MSP, etc.)
- ☐ Maintain a positive work environment to protect the client's interests
- ☐ Knowledge share and document systems
- ☐ Implement strategies and technical systems (backup/security tools) to manage risks during the transition
- ☐ Change passwords to secure the environment from the former MSP and their employees
- ☐ Implement new IT operational tools and take over administration of client-provided tools
- ☐ Provide training to the client IT liaison and end users on how to work with the incoming MSP
- ☐ Provide remote and on-site labor to manage the transition and support users
- ☐ Provide timely support to match the client's need for prompt resolutions and decision making
- ☐ Manage budgets and change orders. Bill accurately and per schedule
- ☐ Document work in online portals so the client can see the status of work
- ☐ Provide strategic guidance on service gaps that put the client at risk
- ☐ Provide a clear team structure and roles for service coordination



Client responsibilities

- ☐ Present incoming MSP with an inventory of services and information the client/current MSP operate that the client needs to carry forward – for example, documentation, online services, historical records, and knowledge of license/contract renewal dates and obligations
- ☐ Provide physical and virtual (password) access to systems
- ☐ Maintain vendor support and pay third-party vendor/MSP fees so the incoming MSP can work with supported, licensed systems
- ☐ Coordinate the procurement of new systems with the incoming MSP to ensure the incoming MSP can support those systems
- ☐ Coordinate transition schedules with all vendors and staff to ensure all parties can support the transition
- ☐ Document expectations around onboarding/offboarding users and computers
- ☐ Use incoming MSP's documentation systems and processes – submitting tickets, updating tickets, and building out technical documentation (e.g., new employee onboarding, which the client shares responsibility to document for IT)
- ☐ Provide a liaison to promptly coordinate day-to-day operations and the transition project, and an executive sponsor/strategic decision maker to get buy-in from third-party vendors and employees
- ☐ Schedule downtime to assist in changing service passwords and tools
- ☐ If possible, work with all parties to stage the transition so all services don't go live on one day. End-user-facing services should go last – for example: 1) documentation, 2) tools/backup, 3) Help Desk



Outgoing MSP responsibilities

- ☐ Uninstall their tools
- ☐ Provide downloads of / access to information and passwords in standard formats, as requested by the client or the incoming MSP
- ☐ Provide collaboration/knowledge-transfer schedules or direct access to resources
- ☐ If possible, work with all parties to stage the transition so all services don't go live on one day. End-user-facing services should go last – for example: 1) documentation, 2) tools/backup, 3) Help Desk. This may require the phased termination of contracts or phased hand-over of system administration
- ☐ Communicate which services they managed that will stop working when they leave
- ☐ Set up incoming MSP with new administrative accounts when needed
- ☐ Re-route third-party or system alerts to the client/ENC for monitoring – for example, a domain renewal notice that the website is about to expire