INSATION Technologies

Switching IT providers: your checklist

Tick these off and switching takes about 30 days. We do the heavy lifting.

1. Before our first call (about an hour, all in)

- [ ] Check your current IT contract: end date, notice period and cancellation terms
- [ ] Pick one person at your office we can check in with
- [ ] List who uses a computer, email or phone, and what they do
- [ ] List the software your team uses, and who holds the licenses
- [ ] Note your equipment: computers, servers, printers, phones, Wi-Fi and network gear
- [ ] Find where your domain, website and email are hosted (or who manages them)
- [ ] Have your internet provider account details to hand
- [ ] Give us permission to contact your current IT provider

2. What we collect from your old provider (with your permission)

- [ ] Admin passwords for computers, servers, Wi-Fi, firewall and router
- [ ] Microsoft 365 or Google Workspace admin access
- [ ] Domain registrar and DNS logins
- [ ] Where your backups are, and proof they restore
- [ ] Software licenses, renewal dates and vendor contacts
- [ ] Network notes or diagrams
- [ ] Removal of their remote-access tools once the handover is done

You don't have to chase any of this. We deal with your old provider directly.

3. Your first 30 days with Insation

Day 1	**Kick-off call**	Meet your onboarding lead and agree the plan and dates.
Days 2-7	**Discovery**	We document every device, account, license and password.
Days 8-14	**Handover**	We get admin access from your old provider and install our tools.
Days 15-25	**Fix the urgent things**	Backups, security gaps and anything at risk, first.
Day 30	**Go live**	Portal logins for your team and a direct line to us.

Our switching guarantee

If you're not happy in the first 30 days, we refund your monthly fees and help you move on. Your price is then locked for 12 months.

Ready to switch? Book a 15-minute call: insationtech.com/contact

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