

SWITCHING IT PROVIDERS

A Business Owner's
Checklist



EXECUTIVE SUMMARY

Choosing the right IT provider can make or break your business operations, security, and future growth. But how do you know if you're making the right choice?

You're not just picking someone to keep the Wi-Fi on. You're picking a partner who'll impact your team's productivity, your customer experience, your security posture, and your ability to grow. In other words: this is boardroom-level stuff, not basement-level maintenance.

This guide helps you navigate the IT provider selection process with clarity and confidence. Whether you're stuck with an underperformer or exploring better options, we outline the common reasons businesses switch, red flags to watch for, and what to look for in your next provider.

At Open Approach, we created this guide to help you make a smart, confident decision. The stakes are high, and so are your standards. We get it. So, we built this to give you the real questions, the sharp insights, and a few laughs--because let's be honest, if you've ever had to call your current provider four times to reboot the same server, you've earned a moment of levity.

If this guide feels a little different, that's because we are. IT should have a seat at the strategy table, not be duct-taped in the basement. Let's raise the bar together.



Scott Bernoudy

CEO & Principal Engineer

Open Approach, Inc.

📞 (802) 242-4050

✉️ sbernoudy@openapproach.com

WHY COMPANIES SWITCH IT PROVIDERS

Before diving into the steps of switching providers, it's important to understand the common reasons companies decide to make a change. This isn't just about fixing tech issues, it's about choosing a partner who understands how IT supports your business strategy. If your current provider isn't aligned with your goals, they're holding you back.

Sometimes it's not a single dramatic moment that drives the switch, it's the slow burn. The drip-drip-drip of missed follow-ups, vague invoices, and the creeping realization that your 'partner' is more help desk than strategic ally. If any of this feels familiar, you're not alone.

Switching IT providers isn't like switching your lunch order, though, to be fair, that can be stressful too. (Reuben or chicken club? What if you regret it? What if someone else at the table orders better?) But unlike lunch, the stakes here are a lot higher.

This is a high-impact move that affects your operations, security, and ability to plan for the future. So why do companies finally make the leap? Here are the most common drivers:

Unreliable Support: Slow response times, unresolved tickets, or lack of proactive communication. Response times slower than a Monday morning.

Security Concerns: Repeated incidents, lack of cybersecurity strategy, or outdated protection. It's like locking your doors but leaving the windows open and hanging a 'Free Wi-Fi' sign outside.

Unexpected Costs: Unexpected fees or hidden charges that take you by surprise and wreak havoc on your budget. Surprise fees that feel like they were dreamt up by a villain in a heist movie, 1 million dollars?!

Growth Misalignment: Your business has scaled, but your IT provider hasn't kept up. Your provider stayed stuck in 2013, back when Candy Crush was king and everyone still used Facebook to RSVP to parties.

No Strategic Guidance: You're not just looking for tech support you want a partner who helps you plan ahead. If their roadmap is "we'll figure it out," that's not a roadmap that's a scavenger hunt with no prize at the end, sad face.

Poor Communication and Transparency: If your provider is hard to reach, uses confusing jargon, or fails to explain costs and decisions clearly, it can erode trust. There's no Google Translate for cryptic tech-speak and invoice hieroglyphics.

Lack of Innovation: Stagnant providers don't help you leverage emerging tech that could improve efficiency and security. If your tech stack looks like a museum exhibit, run.

RED FLAGS THAT IT'S TIME TO MAKE A CHANGE

Not every breakup ends in a dramatic fireball. Sometimes, it's just the quiet frustration of missed deadlines, unclear bills, or feeling like your provider is more ghost than partner.

And while those daily annoyances might seem small, they pile up fast costing you and your team time, money, momentum, and trust. If IT is slowing your business down instead of propelling it forward, the problem isn't just technical. It's strategic.

Here are the red flags that say it's time to make a change:

- Your team complains about tech issues or slow fixes more than the coffee machine.
- You've had a breach or security scare that was swept under the rug.
- Your provider only surfaces when there's a fire (and no extinguisher).
- You're unclear on monthly costs, and their invoices read like treasure maps.
- Their disaster recovery plan includes a prayer and crossed fingers.
- They can't talk compliance without Googling it.
- You feel like a burden, not a client. Worse than being ghosted on Valentine's Day.

THE VENDOR SWITCH CHECKLIST

Changing IT providers isn't something you want to do on a whim—or a caffeine high. It's a transition that can go smoothly or spectacularly sideways, depending on how well you plan.

A structured approach helps you minimize disruptions, protect your data, and keep things moving without turning your workday into a tech-themed escape room. Use this checklist to prepare your organization for the change:

- **Review Your Current Contract**
 - Get out your magnifying glass and lawyer hat. Look for cancellation terms, notice periods, penalties, asset ownership, and any gotchas hidden in the fine print.
 - This is where vendors like to bury the good stuff (and by good, we mean expensive).
- **Document Your Environment**
 - Time to channel your inner detective.
 - Inventory everything devices, servers, software, licenses, and that one weird printer in accounting that only prints on Tuesdays.
- **Back Up All Critical Data**
 - Back it up like it's your playlist from 2006 then double check it and test your backups too. Otherwise, they're just expensive digital decorations.
 - Then test those backups. Twice.
- **Notify Internal Stakeholders**
 - Let your team know about the switch, expected changes, and timeline
 - Keep everyone in the loop especially Bob, who will definitely reply-all with at least three questions and a GIF.
- **Coordinate with Your New Provider**

- Share documentation and access securely.
- Pro tip: Don't send passwords via Post-it, screenshot, or interpretive dance.
- **Set Security Expectations**
 - Review MFA, remote access, firewall policies, and compliance needs.
 - Basically, lock the digital doors before you hand over the keys. MFA, firewalls, compliance needs.
- **Establish Roles and Responsibilities**
 - Who's doing what, when, and why.
 - No guesswork. No finger-pointing. Just a smooth transition without the drama.

WHAT TO LOOK FOR IN A NEW IT PARTNER

Not all IT providers are created equal. Some talk a big game, others vanish like a Wi-Fi signal in a concrete bunker the moment things get tough. The right partner won't just keep things running, they'll help you sleep better at night and plan with confidence during the day.

Look for someone who's thinking two steps ahead, not just asking you to turn it off and on again. (To be fair, that does work sometimes. But it can't be the whole playbook.)

Use this section as your splash-of-reality moment when evaluating potential vendors the traits that reveal who's ready to help you grow and who's just here to reset your password with flair:

- **Proactive Monitoring:** Problems shouldn't surprise you. The right partner is watching before something breaks and fixes it before you notice.
- **Security-First Approach:** Cyber threats evolve fast. You want more than antivirus you want a partner who's building Fort Knox around your digital crown jewels.
- **Strategic Planning:** Technology should fuel your business plan, not just patch holes in it. Look for someone who shows up with roadmaps, budget forecasts, and answers before you ask the question.
- **Industry Experience:** If they know your sector, your tech, and your compliance hurdles, you'll spend less time explaining and more time improving.
- **Clear Pricing:** No fine print gymnastics. Predictable, flat-rate pricing with zero mystery charges or invoice decoding required.

- **Client References:** Real companies. Real feedback. Bonus points if their current clients rave about them like they're talking about a favorite restaurant.
- **Short-Term Contracts:** You should stay because it's working, not because you're locked into a three-year emotional support contract. They should be earning your business every month.

QUESTIONS TO ASK PROSPECTIVE IT PROVIDERS

Asking the right questions can uncover a lot about a potential IT partner's capabilities, approach, and reliability. Ask these questions to cut through the sales pitch and see who really gets it:

- **How do you onboard new clients?** (If they mention "winging it," run.)
- **How do you handle emergencies or after-hours support?**
Translation: When the server's down at 2am, are you showing up with coffee or a cape?
- **What tools do you use for monitoring and alerts?** Extra points if it's not just someone checking an inbox named alerts@maybewe'llseeit.com.
- **How do you support cybersecurity and compliance?** Looking for more than "we use antivirus." This isn't 2003.
- **Do you provide short-term contracts?** Because a good relationship shouldn't require a hostage situation.
- **Can you provide references in our industry?** Ideally, not just your cousin Steve.
- **What does your monthly reporting include?** Hint: "stuff happened" is not a report. A pie chart would be nice.
- **How do you ensure continuity if a technician leaves?** We'd like to avoid a "Brian had all the passwords" situation.

- **How often do you review and update our IT strategy?** Annual check-ins are nice, but we prefer not to only hear from you when it's holiday card season.
- **What's your favorite kind of pizza?** If they say Hawaiian, it's either a red flag or a fun mystery. If they say "gluten-free cauliflower crust with goat cheese and truffle oil," you're in for some interesting Zoom backgrounds.

SAMPLE TRANSITION TIMELINE

Switching providers doesn't have to be overwhelming. A thoughtful timeline helps manage expectations and ensures everyone knows what's happening and when. Here's a sample 4-week transition schedule that you can adapt to your organization's needs:

Week 1:

- Review and finalize service agreement with new provider
- Begin documentation handoff and access setup
- Notify outgoing provider

Week 2–3:

- New provider performs audit of current environment
- Security review and backup validation
- Begin infrastructure monitoring and basic support onboarding
- Internal communications about new support processes

Week 4:

- Legacy provider access shut off
- Full service handoff to new provider
- Final check-ins with internal team and new provider
- Start strategic planning and optimization reviews

ABOUT OPEN APPROACH

We believe IT should just work quietly, confidently, and always in service of your business goals.

At Open Approach, we're not just here to fix problems. We're here to help you plan, scale, and lead with confidence. We're a full-service IT partner that brings strategy to the surface. That means aligning technology with business priorities, creating roadmaps that drive results, and showing up with answers before the questions hit.

Yes, we handle the tech but we also help you make smarter decisions, reduce risk, and align IT with what matters most: your growth. We help IT earn its seat at the table and make sure it stays there.

We focus on being clear, reliable, and easy to work with. You won't need a translator to understand us, and you won't need luck to reach us. Just real partnership, built on trust and a shared vision for what comes next.

If you're ready for IT that feels like part of your leadership team not just support on speed dial, let's talk.



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