

PRACTICAL TOOLS FOR BUSINESS OWNERS

ESCAPE THE IT EMPIRE

Your IT Provider-Switching Kit

Change providers with a plan for access, continuity, and accountability. The goal is a smoother handoff, not a dramatic unplugging ceremony.

The Power to Connect and Control

Use this kit with your team. Record decisions and owners, then bring the gaps to a Free IT Risk Review.

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BEFORE YOU GIVE NOTICE

Know the terrain before the escape.

Review the agreement

Record renewal dates, notice requirements, termination terms, owned versus leased equipment, licensing commitments, and any transition charges. Have the appropriate adviser review obligations you do not understand.

Confirm business ownership

Identify the legal business owner and authorized administrators for domains, DNS, email, cloud services, backup platforms, internet, phone numbers, and critical applications. Do not assume the contact on the invoice has every necessary permission.

Build the transition roster

Name the outgoing provider, incoming lead, business decision-maker, internal IT contact, and application vendors. Agree who can authorize access and changes. Keep ordinary support available while the transition is planned.

Record the mission

Proposed notice date: _____

Target handoff date: _____

Business decision-maker: _____

Continuity owner: _____

THE HANDOFF INVENTORY

These are the records you are looking for.

Accounts and access

- [] Domains, DNS, registrar and business ownership
- [] Microsoft 365 / cloud administrators and recovery routes
- [] Business applications, vendors and licenses
- [] Firewall, switches, Wi-Fi, VPN and documented access
- [] Backup ownership, restore process and recovery keys
- [] Phone numbers, carriers, billing and authorized contacts

Devices and documentation

- [] Users, endpoints, servers and warranty/lifecycle records
- [] Network diagram, site information and configuration backups
- [] Camera/access-system permissions and retention decisions
- [] Open tickets, recurring issues and unfinished projects
- [] Relevant security, onboarding and offboarding procedures

Transfer secrets securely

Use an agreed secure credential-transfer process. Do not paste passwords, recovery codes, client records, or private keys into ordinary email or this worksheet. Validate access with authorized staff and rotate or revoke access under the transition plan.

CUTOVER & ACCEPTANCE

Do. Or do not. Test the handoff.

Protect the operating day

Identify critical applications, payroll, order processing, payments, calling, internet, email, remote users and recovery dependencies. Choose a change window, communication plan, rollback decision and escalation contacts.

Verify before removing the old route

- ☐ [] Named staff can sign in and complete essential tasks
- ☐ [] Support requests reach the new team
- ☐ [] Protection, patching, monitoring and backup ownership are confirmed
- ☐ [] An agreed restore or recovery check has been completed
- ☐ [] Documentation and approved administration access work
- ☐ [] Old access is removed at the agreed point, with exceptions recorded

The first improvement list

Recurring problem to address: _____

Owner and target date: _____

What will show improvement: _____

Unresolved dependency: _____

Your next move

Ask Connexiom for a confidential transition conversation. Bring your priorities and notice timeline; share credentials only through an agreed secure process.