

MSP Transition Master Guide

A complete operational playbook for moving a client from a prior outsourced IT provider to EasyITGuys

Built for respectful communication, secure handoff, clean documentation, and no gaps in support, backup, or cybersecurity coverage.

Document Owner	EasyITGuys Operations / Onboarding / Transition Team
Primary Use	New client onboarding when an incumbent MSP, IT vendor, security provider, or outsourced technology partner exists
Includes	Client notice email, first contact to prior provider, final cleanup email, full timeline, checklists, documentation matrix, and gotchas
Tone Standard	Professional, cooperative, direct, security-focused, and bridge-preserving
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Tip: Use Word Navigation Pane to jump between headings. All major sections use Word heading styles.

1. Purpose and Operating Philosophy

This guide standardizes how EasyITGuys manages an IT transition from a prior outsourced IT provider, MSP, security provider, VoIP provider, cloud provider, or related technology partner. It is built to create a wonderful client experience while protecting the client from common transition risks.

Primary Objectives

1. Protect the client and their business continuity.
2. Avoid gaps in support, cybersecurity, backup, remote access, Microsoft 365 administration, DNS, VoIP, and vendor access.
3. Secure administrative access before old access is removed.
4. Respect the prior provider and preserve the relationship when possible.
5. Make client communication simple and confidence-building.
6. Document what changed, what stayed active, what was removed, and what still needs attention.

Tone Standard

- Warm, professional, and direct.
- Thankful toward the prior provider without over-explaining.
- Clear about deadlines, access needs, and security requirements.
- Never accusatory. Avoid implying the prior provider did anything wrong.
- Bridge-preserving. You may need the prior provider again for historical knowledge, licensing, backups, contract questions, or old project context.

Transition principle

The prior provider is not the enemy. The client made a business decision. EasyITGuys should make the handoff organized, secure, and respectful.

The Three Required External Emails

Email	Sender	Recipient	Purpose
1. Notice of Termination	Client	Prior provider	Formally terminates managed services and authorizes EasyITGuys to coordinate transition.
2. First Transition Contact	EasyITGuys	Prior provider, with client copied	Sets expectations, dates, secure upload method, credentials, documentation, and immediate transition needs.
3. Final Cleanup and Data Disposition	EasyITGuys	Prior provider, with client copied when appropriate	Requests removal of old tools, old access, data deletion, backup/data disposition, and final open items.

2. Roles and Responsibilities

Role	Responsibilities
Client Point of Contact	Sends termination notice, confirms scope, validates services terminating/continuing, approves vendor access, and confirms

Role	Responsibilities
	business impact priorities.
Client Decision Maker	Approves contract, payment, transition timing, final provider decisions, and sensitive access changes.
EasyITGuys Transition Lead	Owns the IT Transition Ticket, prior provider communication, dates, documentation, secure uploads, provider ticket identifiers, and final cleanup.
EasyITGuys Onboarding Lead	Owns onboarding tasks, endpoint deployment, backup deployment, Microsoft/cloud setup, device onboarding, user onboarding, kickoff, and support handoff.
EasyITGuys Technical Team	Executes discovery, security deployment, access validation, remote access cleanup, backups, Microsoft/admin review, and device configuration.
Prior Provider	Provides documentation, administrative access, credentials, vendor and licensing details, tool removal support, and final data disposition confirmation.
Third-Party Vendors	May require remote access, admin accounts, support contracts, API keys, software licensing, or handoff meetings.

3. Required Tickets and Internal Workflow

IT Transition Ticket

Create this ticket when a new client has an existing MSP, IT provider, cybersecurity vendor, cloud administrator, VoIP provider, or other technology provider that must be transitioned away from or coordinated with.

- Record client name, primary point of contact, and decision maker.
- Record prior provider name, phone, email, and known ticket number.
- Track client confirmation that the termination notice was sent.
- Track EasyITGuys first transition email date and recipients.
- Track secure upload link and who has access.
- Track all credentials received and whether they were validated.
- Track services terminating, services continuing, and services unknown.
- Track tamper protection, uninstall passwords, and removal tools.
- Track Microsoft tenant, CSP, GDAP, app integrations, and global admin cleanup.
- Track backup, security, RMM, remote access, DNS, domain, VoIP, and vendor handoff.
- Track final cleanup email, data deletion response, and remaining open items.

Onboarding Ticket

Create the onboarding ticket at the same time as the IT Transition Ticket. The transition ticket manages the old provider handoff. The onboarding ticket manages the EasyITGuys deployment and client experience.

- Confirm service plan and start date.
- Confirm onboarding scope, projects, and any SOW items.
- Confirm employee roster received.
- Confirm payment method and initial payment requirements.
- Prepare welcome communication and support contact details.
- Plan initial tool deployment.
- Plan backup deployment and expected performance impact.
- Plan endpoint security deployment.

- Plan Microsoft and cloud security baseline.
- Schedule kickoff or meeting zero.
- Document client profile, communication preferences, VIP contacts, and business-critical systems.

Sales to Support Handoff

- Contract signed.
- First month and onboarding payment handled as required.
- Payment method on file.
- Employee roster received.
- Client POC confirmed.
- Decision maker confirmed.
- Service plan confirmed.
- Preferred start date confirmed.
- Existing MSP contact information confirmed.
- Known services by prior provider listed.
- Known services staying with prior provider listed.
- Known gotchas, deadlines, payroll dates, board meetings, and blackout windows documented.
- CSRA roadmap, SOW, projects, and cleanup items attached or summarized.
- Any onsite requirements documented.
- Any certificate of insurance requirements documented.

4. Timing Model and Transition Phases

Preferred Timeline: 2 to 4 Weeks

A 2 to 4 week overlap is ideal. It gives EasyITGuys time to install tools, validate backups, secure access, remove unnecessary remote access, ask follow-up questions, and still use the prior provider as a resource if something is missing.

Compressed Timeline

If the termination date is close, prioritize control, continuity, and coverage over perfect documentation. Documentation can be completed after the environment is secure.

- Client authorization confirmed.
- Microsoft/cloud admin access obtained.
- Domain and local admin access obtained.
- Firewall access obtained.
- DNS and domain access obtained.
- Endpoint protection deployed or staged.
- Backup jobs started or staged.
- Prior provider remote access identified.
- Known prior provider tools identified and scheduled for removal.
- Emergency support path communicated to client.

Phase Summary

Phase	Timing	Owner	Success Criteria
Phase 0: Pre-Handoff	Before client sends notice	Sales / Transition Lead	Contract, payment, client POC, prior provider info, service scope, and notice template ready.
Phase 1: Client Notice	Before EasyITGuys contacts prior	Client	Termination notice sent. Client

Phase	Timing	Owner	Success Criteria
	provider		confirms sent.
Phase 2: First Provider Contact	Same day as confirmation where possible	Transition Lead	Provider receives respectful request, dates, secure upload method, immediate needs, and documentation list.
Phase 3: Stabilize Access and Coverage	Day 1 to Week 1	Onboarding / Technical Team	Admin access validated, security active, backups active, remote access risk reviewed.
Phase 4: Cleanup and Documentation	Week 1 to Week 4	Onboarding / Technical Team	Old tools removed, old access removed, documentation imported, exceptions tracked.
Phase 5: Final Confirmation	After replacement coverage is verified	Transition Lead	Final cleanup email sent, data deletion/retention response received, remaining items documented.

5. Client Communication Process

Do Not Overcomplicate the First Client Step

- Do not require the client to CC EasyITGuys on the initial termination notice.
- Ask the client to confirm once the notice has been sent.
- Offer to fill out the notice if they want help, but do not assume they want a prefilled letter.
- Keep the client experience simple and reassuring.
- After the client confirms the notice was sent, EasyITGuys sends the provider transition email and copies the client for transparency.

Client Guidance About Paying the Prior Provider

EasyITGuys should recommend professional closure. A prior provider who is paid fairly and treated respectfully is more likely to provide helpful documentation, answer follow-up questions, and cooperate if an old backup, license, or project note is needed later.

- Encourage the client to pay valid final invoices.
- Encourage the client to honor applicable contracts and licensing obligations.
- Explain that additional transition support may have a cost if it is outside the prior provider's normal offboarding service.
- Avoid burning the bridge. The prior provider may have historical context that nobody else has.
- Document any disputed invoices, leased equipment, licensing terms, or service continuation needs.

6. Email Template 1: Client Notice of Termination

Use case: This email is sent by the client to the prior provider. EasyITGuys can provide the template and assist with filling it out. The client should send it directly.

Important

This template is intentionally simple. The client should not have to understand every technical detail before sending it. The goal is to authorize the transition and start the process.

Subject

Notice of Termination of Services Effective [Termination Date]

Body

Dear [Prior Provider Name or Team],

I hope this message finds you well. I want to thank your team for the support and services you have provided to [Client Company Name].

This message serves as formal notice that [Client Company Name] has decided to transition managed IT services away from your organization, effective [Termination Date], or in accordance with the notice period required under our agreement.

We will begin transitioning services to EasyITGuys starting [Migration Start Date]. Our goal is to ensure a smooth and orderly handoff for all involved parties.

The termination applies to the following services, unless otherwise agreed in writing:

- Managed IT support services.
- Cybersecurity and compliance services.
- Endpoint security, monitoring, backup, remote access, or management tools provided as part of managed services.
- [Add or remove services as applicable.]

The following services may need to continue temporarily or be handled separately:

- VoIP or phone numbers.
- Email or Microsoft cloud services.
- Website, DNS, domain registration, or hosting.
- Licensing, leased equipment, or other contractual items.
- [Add or remove services as applicable.]

If there are any outstanding contractual obligations, renewal terms, leased equipment, licensing issues, final invoices, or items requiring our attention before the transition date, please notify us promptly so they can be addressed without delaying the handoff.

We authorize EasyITGuys to act on our behalf to coordinate the transition. EasyITGuys will contact you separately regarding documentation, administrative access, secure credential transfer, software removal, and service responsibility timelines.

Please continue to provide support under the current agreement through the final service date unless otherwise communicated in writing.

Thank you for your past support and for your professionalism during this transition. We appreciate your assistance in helping make this process as seamless as possible.

Sincerely,

[Sender Name]

[Title]

[Company Name]

[Phone Number]

[Email Address]

7. Optional Internal Email: EasyITGuys to Client With Notice Template

Use case: This is sent to the client to make the termination step easy. This is not one of the three external provider templates, but it belongs in the internal process.

Subject

IT Transition Notice Template for [Client Company Name]

Body

Hi [Client First Name],

We prepared a simple termination notice template you can send to your current IT provider when ready.

You do not need to copy EasyITGuys on the initial notice unless you want to. Once it has been sent, please reply to this ticket and let us know. After that, we will create the formal IT transition communication with your current provider and include you for transparency.

The services we believe should be included in the notice are:

- [Service 1]
- [Service 2]
- [Service 3]

The services that may need to continue temporarily or be handled separately are:

- [Service 1]
- [Service 2]
- [Service 3]

Please review the template below. If you would like us to fill it out for you, reply and we can prepare a copy-paste version.

[Paste Client Notice of Termination Template]

Thank you,

[EasyITGuys Team Member]

8. Email Template 2: EasyITGuys First Contact to Prior Provider

Use case: Send this after the client confirms that the termination notice was sent. Copy the client point of contact to validate the request and keep the communication transparent.

Subject

[Client Company Name] IT Transition Coordination | [Transition Ticket ID]

Body

Hi [Prior Provider First Name or Team],

I'm [Name] from EasyITGuys. We are now coordinating IT support and transition work for [Client Company Name].

Transitioning between providers is never easy, but our goal is to make this process as smooth, respectful, and secure as possible. We appreciate your cooperation and the work your team has provided to [Client Company Name].

I have copied [Client Point of Contact Name] to confirm the validity of this request and to keep the process transparent.

For coordination, please let us know your preferred contact method for this transition. If no alternate contact is provided, we will use:

[Prior Provider Contact Name]

[Prior Provider Phone]

[Prior Provider Email]

IMPORTANT DATES

Final date of services: [Date]

Target transition completion date: [Date or Timeline]

SERVICES TERMINATING

Based on the information available to us, the following services are expected to terminate:

1. [Managed IT support services]



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2. [Cybersecurity and compliance services]
3. [Endpoint security, monitoring, backup, remote access, or RMM tools]
4. [Other]

SERVICES CONTINUING OR REQUIRING SEPARATE COORDINATION

The following services may need to continue temporarily or require separate coordination:

1. [VoIP or phone numbers]
2. [Email or Microsoft cloud services]
3. [Website, DNS, domain registration, or hosting]
4. [Licensing, leased equipment, or vendor-managed services]
5. [Other]

If we missed anything, please identify any services, contracts, licensing, hosted systems, equipment, renewal terms, or support dependencies that require attention beyond the final service date.

IMMEDIATE TRANSITION REQUIREMENTS

1. Helpdesk communication: For efficient coordination between our helpdesks, please include our message identifier in your transition ticket subject: [EasyITGuys Transition Ticket ID or Message Identifier]. We will also add your ticket identifier to our ticket system if you provide one. This helps both helpdesks keep communication threaded correctly and reduces duplicate autoresponses.
2. Tamper protection and software removal readiness: Please provide any tamper protection passwords, uninstall passwords, uninstall commands, or removal instructions for security, backup, RMM, remote access, DNS filtering, browser protection, application control, encryption management, or monitoring software deployed by your team. If you prefer to remove your tools remotely, please confirm the planned removal date and scope before removal so we can avoid gaps in coverage.
3. Administrative access and documentation: Please securely provide available documentation and administrative access for systems you managed or supported, including domain administrator and local administrator access; Microsoft 365, Google Workspace, or email administration; DNS and domain registrar access; firewall, switch, wireless, VPN, NAS, SAN, UPS, printer, and scanner access; server, virtualization, IPMI, iDRAC, iLO, and storage access; backup and disaster recovery systems; VoIP, phone system, and DID information; ISP account information; website, hosting, SSL, and web platform access; line of business applications and vendor contacts; existing support issues, open projects, known risks, and recurring tasks.

MICROSOFT CLOUD AND LICENSING COORDINATION

If your team currently manages Microsoft 365, Azure, Entra ID, GDAP, CSP licensing, Pax8, or another cloud vendor relationship, please identify the current licensing provider or distributor, active annual or non-cancelable licensing terms, delegated admin relationships, global admin accounts controlled by your team, Conditional Access policies, cross-tenant access settings, enterprise applications or app registrations connected to your management tools, and backup, security, email filtering, archiving, or monitoring tools connected to the tenant.

Please do not remove tenant access, licensing, security, or backup services until we have coordinated timing and confirmed replacement coverage.

SECURE SUBMISSION OF SENSITIVE INFORMATION

Option 1: Upload documentation and credentials here: [Secure SharePoint or Secure Upload Link]

Option 2: Send an encrypted email to: [Secure Email Address]

If another person on your team needs access to the secure upload location, please send their name and email address and we can add them.

RECOMMENDATION FOR SMOOTH TRANSITION

We encourage our clients to settle open balances with their prior provider and honor applicable agreements as part of a clean offboarding process. We also recommend that reasonable time spent preparing documentation, exports, or transition assistance be handled professionally if it is not already included in the provider's offboarding services.

Thank you for your cooperation. We appreciate your help in making this transition safe, respectful, and efficient for the client.

Best regards,

[Name]

[Title]

EasyITGuys

[Phone]

[Email]

9. Email Template 3: Final Cleanup, Software Removal, and Data Disposition

Use case: Send this only after EasyITGuys has verified that replacement services are active, backups are running, administrative access is secured, and prior provider access can safely be removed.

Do not send too early

Do not ask the prior provider to delete data, remove backups, remove tools, or remove access until replacement coverage is verified and the client risk has been reviewed.

Subject

[Client Company Name] Final IT Transition Cleanup and Data Disposition

Body

Hi [Prior Provider First Name or Team],

Thank you again for your cooperation during the transition for [Client Company Name].

We have completed the primary transition of support, security, backup, and administrative access to EasyITGuys. At this point, we are ready to coordinate final cleanup of your tools, access, and retained client data.

Please complete the following items, as applicable.

SOFTWARE AND TOOL REMOVAL

Please remove or help us remove any software, agents, extensions, services, or management tools deployed by your team, including RMM or endpoint management tools, remote access tools, endpoint security tools, backup tools, DNS filtering or web filtering tools, browser protection extensions, application allowlisting or elevation control tools, encryption management tools, monitoring agents, scripting agents, or automation tools.

If any software requires tamper protection removal, uninstall passwords, cleanup tools, or removal scripts, please provide those securely or confirm that your team will complete removal remotely.

Please confirm when removal is complete.

ACCOUNT AND ACCESS REMOVAL

Please remove or disable any accounts, delegated access, VPN access, cloud administration access, remote access, portal access, or third-party management relationships used by your team for [Client Company Name], unless a specific service is still active under a separate agreement.

If any access must remain temporarily, please identify the system or portal, the reason access must remain, the expected removal date, and the client approval needed, if any.

CLIENT DATA, BACKUPS, AND DOCUMENTATION

Please delete client data, exports, backup copies, credentials, documentation, system inventories, and other retained client information that your company is no longer required to keep.

If any records must be retained for contractual, legal, compliance, insurance, billing, or audit reasons, please identify the category of retained records and the retention basis. We are not asking you to delete information you are legally or contractually required to keep.

Please confirm when data disposition is complete.

FINAL ITEMS

Please let us know if there are any remaining invoices, equipment returns, licensing transfers, contract items, or open service matters the client needs to address.

Thank you for your professionalism and cooperation throughout this process. We appreciate your help and wish your team all the best.

Best regards,

[Name]

[Title]

EasyITGuys

[Phone]

[Email]

10. Client Questions to Ask During Transition

Outside Partner and Vendor Access

- Do any outside partners need access to your systems?
- Does your bank, city utility provider, accounting firm, payroll provider, auditor, or insurance provider access any systems?
- Do any line of business software vendors remote into servers or workstations?
- Do any vendors use VPN, RDP, remote support tools, shared accounts, service accounts, or cloud admin portals?
- Who manages your website, DNS, domain, hosting, SSL, or email records?
- Who manages your VoIP system and phone numbers?
- Who manages cameras, door access, alarm systems, gates, or keycard systems?
- Who manages printers, copiers, scanning, faxing, eFax, or postage systems?
- Do you have cyber insurance, audit requirements, compliance obligations, or customer security questionnaires?
- Does your building require a certificate of insurance before onsite project work?

Business Priority Questions

- What systems must work on day one?
- What would cause the biggest disruption if missed?
- Are there any unresolved tickets, old projects, or known problems?
- Are there any deadlines, payroll days, board meetings, production schedules, court dates, billing cycles, or public meetings we should avoid disrupting?
- Who are the VIP users or decision makers?
- Who approves vendor access or administrative changes?
- Who approves licensing changes?
- Who should receive outage or security communications?
- Who should not be interrupted without approval?

11. Documentation and Access Request Matrix

This matrix combines the practical takeover request list with the operational items EasyITGuys must verify. It should be used as a checklist, not as a reason to delay stabilizing security and backups.

General Documentation

- Last 12 months of support ticket export where available
- Open support tickets and current issues
- Recurring tasks
- Network diagrams

- Inventory exports
- Warranty and care pack details
- Policies such as BYOD, mobile device, acceptable use, and privacy policies
- Business continuity and disaster recovery plans
- Known risks, upcoming renewals, and known pain points

Microsoft, Cloud, and Email

- Microsoft 365 admin access
- Azure / Entra ID admin access
- Tenant ID
- Domain list
- Licensing provider or CSP
- GDAP or delegated admin relationships
- Global admin accounts controlled by prior provider
- Conditional Access policies
- Cross-tenant access settings
- Enterprise applications and app registrations
- Email filtering, backup, archiving, encryption, and journaling tools
- Shared mailboxes, distribution groups, and admin/service accounts

Identity, Domain, and Local Access

- Domain administrator credentials
- Local administrator credentials
- Directory Services Restore Mode passwords
- Service account list
- Domain controller list
- Group Policy summary
- File shares and mapped drives
- SQL SA credentials where applicable
- Local admin group membership
- BitLocker recovery key location and management method

Network and Infrastructure

- Firewall admin access
- Switch admin access
- Wireless AP or controller access
- VPN details
- Remote access methods
- Public IP addresses
- ISP account numbers
- VLAN and subnet documentation
- DHCP and DNS details
- NAS and SAN access
- UPS management access
- Printer and scanner admin access
- Camera and door access system information

Servers and Virtualization

- Physical server list
- Virtual host access
- Hyper-V, VMware, or other virtualization access
- IPMI, iDRAC, or iLO access
- Storage admin access
- Server roles and purpose
- Backup schedules and retention
- Critical application dependencies

Security, Backup, and Management Tools

- RMM tools
- Remote access tools
- Endpoint security tools
- Backup tools
- DNS or web filtering tools
- Browser extensions
- Application allowlisting tools
- Encryption tools
- Monitoring tools
- Tamper protection details
- Uninstall passwords
- Removal scripts or commands

Web, Domains, and Public Services

- Domain registrar access
- DNS hosting access
- Website hosting access
- WordPress or CMS admin access
- SSL certificate details
- CDN or WAF details
- Website vendor contacts
- Public DNS records

VoIP, Phones, and Communications

- VoIP admin access
- Phone number inventory
- DID list
- Extension list
- Call routing
- Auto attendant configuration
- Fax or eFax services
- SMS services
- SIP trunk or carrier details

Third-Party Vendors and Business Systems

- Line of business applications
- Vendor contact information

- Support contract information
- Application license information
- Vendor portal access
- Payroll systems
- Accounting systems
- Banking integrations
- Digital signage
- Physical security vendors
- Printer/copier vendors

12. Day 0 Checklist: Before Active Transition Work

Day 0 is before the official start date or before active technical transition begins. The purpose is to make sure EasyITGuys is authorized and ready.

- Confirm agreement signed.
- Confirm payment and onboarding invoice status.
- Confirm payment method on file.
- Confirm client point of contact.
- Confirm decision maker.
- Confirm start date.
- Confirm services sold and service plan.
- Confirm project/SOW items.
- Confirm existing MSP contact information.
- Send notice template to client.
- Ask whether client wants EasyITGuys to fill out the notice.
- Client sends termination notice directly.
- Client confirms notice was sent.
- Create IT Transition Ticket.
- Create Onboarding Ticket.
- Create secure upload location.
- Prepare EasyITGuys first contact email to prior provider.
- List services terminating.
- List services continuing.
- List services unknown.
- List urgent deadlines and blackout windows.
- Identify whether VoIP, phone numbers, DNS, hosting, email, or licensing must stay active temporarily.

13. Day 1 Checklist: Control, Continuity, and Coverage

Day 1 should focus on who can access the systems, how the client is protected, and whether the business can keep operating.

Client Experience

- Send welcome email to client.
- Confirm support channels.
- Confirm emergency escalation method.
- Confirm client champions and approvers.
- Confirm communication expectations.
- Explain that discovery may uncover old tools, old accounts, or unknown access paths.
- Explain that backup deployment may be throttled during business hours to avoid performance issues.

Technical Priorities

- Validate Microsoft/cloud access.
- Validate domain admin access.
- Validate local admin access.
- Validate firewall access.
- Validate DNS and domain access.
- Validate backup access or start EasyITGuys backup deployment.
- Start endpoint security deployment.
- Start EasyITGuys RMM / support tool deployment.
- Identify prior provider RMM and remote access tools.
- Identify VPN access, RDP exposure, FTP/SFTP, remote management ports, and firewall inbound rules.
- Identify local admins, domain admins, service accounts, and vendor accounts.
- Document critical risk items immediately.

14. Week 1 Checklist: Secure the Environment

Week 1 is where EasyITGuys should aggressively reduce access risk while avoiding service disruption.

- Validate Microsoft tenant access and admin accounts.
- Create or confirm EasyITGuys/admin-approved cloud admin accounts.
- Confirm MFA for admin accounts.
- Remove or disable old provider global admin accounts when safe.
- End old provider delegated admin relationships when safe.
- Inspect enterprise applications and app registrations.
- Inspect Conditional Access policies.
- Inspect cross-tenant access settings.
- Review domain admins and local admins.
- Review service accounts.
- Review discovered remote access software.
- Meet with client to confirm approved remote access needs.
- Confirm vendor remote access requirements.
- Lock down unnecessary firewall rules.
- Remove or contain prior provider RMM and remote access tools.
- Change firewall, switch, wireless, NAS, server, and local admin passwords where applicable.
- Confirm backups are running.
- Confirm endpoint security is active.
- Confirm support tools are active.
- Document exceptions and client-approved temporary access.

15. Week 2 to Week 4 Checklist: Clean Up and Stabilize

- Finish documentation import.
- Finish inventory cleanup.
- Finish server and application discovery.
- Finish vendor list.
- Finish license list.
- Review old tickets and known issues received from prior provider.
- Confirm backup retention strategy.
- Confirm Microsoft licensing and CSP transfer if applicable.
- Confirm VoIP transition plan and number porting plan if applicable.

- Confirm DNS and domain ownership.
- Confirm website and hosting ownership.
- Confirm physical security access.
- Confirm camera system access.
- Confirm printer and scanner configuration.
- Confirm cyber insurance and audit requirements.
- Send final cleanup email when replacement coverage is verified.
- Document data deletion or retention response.
- Close transition ticket after final confirmations and exceptions are documented.

16. Microsoft Cloud Transition Checklist

Immediate Access

- Confirm Microsoft 365 admin center access.
- Confirm Entra admin center access.
- Confirm tenant ID.
- Confirm accepted domains.
- Confirm at least two client-approved admin accounts.
- Confirm MFA on admin accounts.
- Confirm break-glass strategy if appropriate.
- Confirm licensing provider or CSP.
- Confirm license commitments and renewal dates.
- Confirm backup, security, filtering, archiving, and monitoring integrations.

Old MSP Relationship Cleanup

- End old MSP relationship when safe.
- Remove old MSP delegated admin relationship when safe.
- Remove old MSP global admin accounts when safe.
- Remove old MSP service accounts when safe.
- Inspect all app integrations before removal.
- Remove old MSP enterprise apps or app registrations only after confirming they are not required for active services.
- Confirm mail flow, spam filtering, journaling, archiving, and backups before removing old tools.

Pax8 / CSP / Licensing Move

- Identify current Microsoft licensing provider.
- Identify annual or NCE commitments.
- Confirm non-cancelable terms.
- Confirm transfer process.
- Confirm no interruption to licensing.
- Document any pass-through costs, renewal dates, and client approvals.

17. Remote Access and Management Cleanup

The first security question in a transition is simple: who can get into the client systems, why do they have access, and is that access still needed?

Look For

- RMM agents

- ConnectWise Control / ScreenConnect
- Datto RMM
- Kaseya
- NinjaOne
- Splashtop
- AnyDesk
- TeamViewer
- LogMeIn
- GoTo Resolve
- Atera
- Pulseway
- VPN clients
- Remote desktop exposure
- Browser-based remote support tools
- Old scripts or scheduled tasks
- Remote access inside camera, door access, copier, and line of business vendor systems

Removal Process

1. Identify software through inventory, software discovery, RMM dataviews, endpoint scans, and manual review.
2. Mark each item approved, blocked, unknown, or pending client validation.
3. Confirm business need with the client.
4. Confirm vendor access needs and whether named users or shared accounts are being used.
5. Attempt normal uninstall first when safe.
6. Use prior provider uninstall commands or removal tools if needed.
7. Remove tamper protection before removal.
8. Confirm removal through inventory and endpoint check-in.
9. Document exceptions and temporary approvals.

Known Automation Notes

- [] ScreenConnect / Control: use internal uninstall process for competing ScreenConnect installs where approved.
- [] Datto RMM: use internal uninstall process where approved.
- [] Kaseya: use internal uninstall process where approved.
- [] Always verify the tool being removed is not the EasyITGuys tool or an approved vendor tool.
- [] Always confirm replacement access and support method before removing the only working remote access path.

18. Backup Transition Rules

No backup gap

Do not remove old backup systems until EasyITGuys understands the data risk and replacement backups are running or a client-approved plan exists.

- [] Identify all protected systems.
- [] Identify backup type: file/folder, image, SaaS, cloud-to-cloud, BCDR, appliance, NAS, SQL, VM, or application-specific.
- [] Identify retention period.

- Identify restore method.
- Identify cloud and local copies.
- Identify encryption keys or restore credentials.
- Confirm EasyITGuys backup configuration.
- Confirm first jobs have started.
- Confirm backup throttling expectations during business hours.
- Confirm whether old backup retention must be preserved for legal, insurance, compliance, or operational reasons.
- Document client-approved risk if old backups are deleted.

19. Security Transition Rules

No security gap

Before prior security tools are removed, make sure EasyITGuys security tooling is active or a client-approved exception exists.

- Deploy EasyITGuys endpoint security.
- Confirm devices are checking in.
- Confirm policy assignment.
- Confirm alert routing.
- Confirm tamper protection status.
- Confirm exclusions or special application needs.
- Confirm application allowlisting plan if applicable.
- Confirm DNS/web filtering plan if applicable.
- Confirm old tool removal timing with the prior provider.
- Document coverage gaps or endpoints not yet onboarded.

20. BitLocker and Encryption Transition

BitLocker should be specifically discussed because losing recovery key access can create unnecessary risk.

- Ask the prior provider whether BitLocker is currently managed.
- Ask whether keys are stored in Microsoft cloud, Active Directory, RMM, another portal, or documentation.
- If Microsoft cloud managed, confirm tenant access and recovery key visibility.
- If Active Directory managed, confirm domain admin access and recovery key visibility.
- If RMM or third-party managed, request export or secure transfer of keys before removing tools.
- Document whether any devices are encrypted but have unknown recovery key storage.
- Do not remove encryption management tooling until key custody is understood.

21. Physical Security and Building Access

- Ask about physical keys held by the prior provider.
- Ask about keycards, fobs, door codes, gate codes, alarm codes, and camera access.
- Ask about door access system admin credentials.
- Ask about camera system admin credentials.
- Ask whether any old provider users have building access.
- Ask the prior provider to return or securely destroy physical access items if applicable.
- Change passwords or disable old users for camera, door access, alarm, and building systems.
- Document any access that remains active and why.

22. VoIP, Phone Numbers, DNS, Domains, and Websites

VoIP and Phone Numbers

- Do not cancel phone service before DIDs are ported or forwarding is confirmed.
- Identify carrier, account number, BTN, DIDs, extensions, call queues, auto attendants, fax lines, elevator lines, alarm lines, and emergency phones.
- Confirm which services terminate and which continue.
- Confirm whether one extension or forwarding arrangement needs to remain active temporarily.
- Confirm 911/E911 details.
- Confirm phone hardware ownership.

DNS, Domains, and Websites

- Identify domain registrar.
- Identify DNS host.
- Identify website host.
- Identify SSL certificate issuer and expiration.
- Identify WordPress or CMS admin access.
- Identify CDN, WAF, or security provider.
- Confirm domain ownership.
- Confirm admin email and recovery method.
- Change registrar, DNS, hosting, and CMS credentials where appropriate.
- Document all public DNS records before making changes.

23. Service Continuation and Termination Matrix

Use this section to avoid accidental cancellation of a service that still supports the business.

Service	Terminate?	Continue Temporarily?	Risk if Mishandled	Notes
Managed IT Support	Usually yes	Rarely	Support confusion or duplicate responsibility	Define final support date.
Endpoint Security	Yes after replacement	Sometimes	Security gap	Deploy EasyITGuys protection first.
Backups	Only after replacement plan	Often	Data loss or retention loss	Verify retention and restores.
RMM / Remote Access	Yes after replacement	Sometimes	Loss of support path or unauthorized access	Know what you are removing.
Microsoft 365 Licensing	Not always	Often	License interruption	Check NCE and CSP terms.
VoIP / Phone Numbers	Not until ported	Often	Phone outage or lost number	Keep DIDs active.
DNS / Domains	No, transfer/control	Often	Email/website outage	Confirm ownership.
Website / Hosting	Depends	Often	Website outage	Coordinate separately.
Firewall / Appliance	Depends on ownership	Sometimes	Network outage	Confirm leased/provider-owned hardware.
Cyber Insurance / Compliance Tools	Depends	Sometimes	Compliance gap	Confirm requirements.

24. Common Transition Gotchas

Helpdesk Ticket Loop

If both providers use ticket systems, autoresponders can create loops or duplicate tickets. Fix this by adding the other provider's ticket number to your ticket subject and asking them to add the EasyITGuys message identifier to theirs.

VoIP Cancellation Too Early

Phone numbers can be difficult or impossible to recover if mishandled. Keep VoIP and DID's active until porting, forwarding, and ownership are confirmed.

DNS and Domain Ownership Confusion

Registrar, DNS host, website host, SSL issuer, CDN, and email provider may all be different. Confirm each one separately.

Microsoft Annual Licensing

Microsoft NCE or annual licensing may be non-cancelable. Do not assume the client can immediately stop paying old licensing fees.

Backup Retention

Old backups may be needed for recovery, insurance, compliance, audit, or legal reasons. Do not request deletion until replacement coverage and retention needs are understood.

Provider-Owned Equipment

Firewalls, backup appliances, phones, switches, and access points may be leased, rented, bundled, or provider-owned. Confirm ownership before changing or removing anything.

Remote Access Left Behind

Old remote access tools are a high priority. Identify who can access systems, why they have access, and whether access is still needed.

BitLocker Keys Lost

Removing an old RMM or management portal before recovery keys are transferred can create unnecessary recovery risk. Confirm key custody first.

25. Internal Completion Criteria

The IT Transition Ticket should not be closed until these items are complete or documented as approved exceptions.

- Client sent termination notice.
- Prior provider was contacted by EasyITGuys.
- Critical admin access was obtained and validated.
- Microsoft/cloud access was secured.
- DNS and domain ownership were confirmed.
- Firewall and network access were secured.
- Backup coverage is active or exception documented.
- Endpoint security coverage is active or exception documented.
- EasyITGuys support tools are active or exception documented.
- Prior provider remote access is removed or approved as temporary exception.
- Prior provider accounts are removed or approved as temporary exception.
- Final software removal request was sent.

- Data deletion or retained-records response was received.
- Remaining contractual, licensing, equipment, or invoice issues are documented.
- Client is aware of any remaining risks or unresolved items.

26. Meeting Zero / Kickoff Agenda

Meeting zero should be short, confident, and organized. It should make the client feel that the transition is under control.

- Introduce EasyITGuys transition and onboarding contacts.
- Confirm support start date.
- Confirm how employees request help.
- Confirm emergency path.
- Confirm key business systems.
- Confirm vendor access needs.
- Confirm timing for backup/security/RMM deployment.
- Confirm expected impact, such as backup bandwidth or brief reboots.
- Confirm who approves administrative changes.
- Confirm who receives status updates.
- Confirm any onsite work or scheduling constraints.

27. Monday.com / Task Board Structure

Group	Task Examples	Owner
Authorization and Handoff	Contract signed; payment handled; POC confirmed; termination notice sent; transition ticket created.	Sales / Transition Lead
Prior Provider Coordination	First email sent; secure upload created; provider ticket ID captured; documentation requested.	Transition Lead
Access and Identity	Microsoft admin; domain admin; local admin; service accounts; MFA; delegated relationships.	Technical Team
Security and Backup	Endpoint security; backup deployment; old security removal; tamper protection; retention review.	Technical Team
Network and Infrastructure	Firewall; switches; Wi-Fi; VPN; inbound rules; ISP; NAS/SAN; UPS; printers.	Technical Team
Cloud, DNS, Website, VoIP	CSP/Pax8; DNS; domains; web hosting; SSL; VoIP; phone numbers.	Transition Lead / Technical Team
Cleanup and Closure	Old tools removed; old access removed; data deletion response; final invoices/equipment documented.	Transition Lead

28. Appendix A: Quick Copy/Paste Service Lists

Common Services Terminating

- Managed IT support services
- Cybersecurity and compliance services
- Endpoint security software
- Backup software and backup monitoring

- RMM and monitoring agents
- Remote access tools
- Application allowlisting or elevation control
- DNS or browser filtering
- Managed firewall service
- Managed Microsoft 365 administration
- Helpdesk and end-user support

Common Services Continuing Temporarily

- VoIP service and phone numbers
- One VoIP extension for forwarding
- Email or Microsoft licensing during CSP transfer
- DNS and domain registration
- Website hosting
- SSL certificates
- Cloud backups during retention review
- Leased firewalls or appliances
- Line of business vendor access
- Printer/copier support contracts

Common Immediate Needs

- Admin access to Microsoft 365 or email system
- Admin access to DNS and domain registrar
- Firewall access
- Domain admin and local admin credentials
- Tamper protection and uninstall passwords
- Backup system access and retention information
- Remote access and VPN documentation
- Open ticket and known issue list

29. Appendix B: Fast-Risk Decision Tree

If We Do Not Have Microsoft Admin Access

- Escalate as critical.
- Ask prior provider and client for global admin access.
- Confirm client-owned admin account exists.
- Avoid removing old provider tenant access until EasyITGuys access is validated.
- Document risk if delayed.

If We Do Not Have Firewall Access

- Escalate as high priority.
- Ask prior provider for firewall admin credentials.
- Ask client whether firewall is provider-owned, leased, or client-owned.

- Inspect for remote access ports as soon as access is obtained.
- Plan password changes when safe.

If Backups Are Unknown

- Treat as high risk.
- Ask prior provider for current backup solution, retention, restore method, and protected systems.
- Start EasyITGuys backup discovery/deployment where possible.
- Do not approve deletion of old backups until risk is reviewed.

If Old RMM Cannot Be Removed

- Request tamper protection password and uninstall command.
- Ask prior provider to schedule remote removal.
- Use internal removal scripts if approved and safe.
- Confirm no business-approved vendor depends on that tool.
- Document exception if removal must wait.

30. Final Note

A good transition is not just technical. It is operational, contractual, emotional, and relational. The client needs confidence. The prior provider deserves respect. EasyITGuys needs control, access, backups, security, and documentation. When this guide is followed, the transition should feel calm, professional, and secure.