



Your Next IT Move:

The IT Transition Playbook

**A practical guide for New Jersey
businesses considering a change
in technology support.**

Breaking Up Is Hard To Do

The goal isn't changing providers.

The goal is creating a better technology experience for your business.

Most businesses don't wake up one morning and decide to replace their IT provider.

The process usually starts slowly.

Maybe support tickets take longer to resolve. Perhaps recommendations become harder to understand. Maybe your business has grown while your technology strategy has remained stuck in the past.

For many organizations, changing IT providers feels overwhelming. Questions start piling up:

The good news is that successful IT transitions happen every day.

This guide will help you understand when a change makes sense, how to prepare for it, and how to avoid common mistakes during the process.

The questions we hear most:

- Will we lose access to anything?
- What happens to our passwords?
- Will there be downtime?
- What if our current provider doesn't cooperate?

Recognizing The Warning Signs

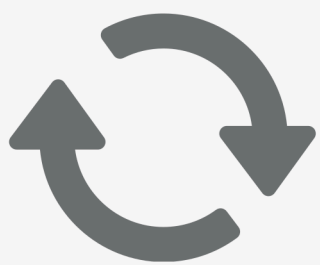
Is Your IT Relationship Still Working?

Every relationship experiences bumps in the road.

The question is whether those bumps are temporary or signs of a larger problem.

Some common warning signs include:

**Technology Problems
Repeatedly Returning**



**Slow Response
Times**



**Minimal Strategic
Guidance**



**Unclear Cybersecurity
Planning**



Surprise Invoices



**Lack of
Communication**



These problems could be getting in the way of your productivity.

When these issues become routine rather than occasional, it may be time to ask whether your current support model is still serving your business.

How Do You Know When it's Time To Move On?

The Cost of Staying Too Long

Businesses often stay with an IT provider long after they have lost confidence.

Why?

Because change feels risky.

Unfortunately, staying put can create hidden costs:

Productivity Loss

Employees waste time working around recurring issues.

Security Risk

Outdated systems and weak protections create vulnerabilities.



Missed Opportunities

Technology should help your business grow—not simply keep the lights on.



Low Morale

Poor support affects morale more than many business owners realize.

"The biggest risk is not taking any risk... In a world that's changing really quickly, the only strategy that is guaranteed to fail is not taking risks."

— Mark Zuckerberg

Preparing For The Transition

Before You Make The Move

A little preparation can make a huge difference.

Before beginning a transition, gather information about:

Cloud and Accounts

Microsoft 365, domain registrations, and administrative access.

Connectivity

Internet providers, network equipment, and vendor contacts.

Business Systems

Applications, licensing, and critical workflows.

Devices

Hardware inventory, warranties, and lifecycle details.

Security

Security tools, backup solutions, and recovery procedures.

Documentation

Diagrams, passwords, agreements, and support records.

You do not need every answer.

A good transition partner can help fill in the gaps, identify what matters most, and guide you through the rest.



What Should Transfer?

Your Business Should Own Its Technology

One of the most important lessons businesses learn during a transition is understanding what belongs to them.

This includes:

- ✓ **Administrative credentials**
- ✓ **Microsoft 365 access**
- ✓ **Backup ownership**
- ✓ **Network documentation**
- ✓ **Domain registrations**
- ✓ **Vendor relationships**
- ✓ **Security configurations**
- ✓ **Licensing information**
- ✓ **Firewall & router access**
- ✓ **Wi-Fi credentials**
- ✓ **Endpoint management**
- ✓ **Domain & DNS access**
- ✓ **VoIP administration**
- ✓ **SaaS admin access**
- ✓ **Hardware inventory**
- ✓ **Software licenses & renewals**



If you are unsure whether your business controls these items, now is a good time to ask.

Protecting What Matters Most

Transitions create an opportunity to review security controls that may have been overlooked for years.

At IT Radix, we typically review:

- Multi-factor authentication
- Microsoft 365 security settings
- Email protection
- Endpoint protection
- Backup integrity
- Administrative accounts
- Password management
- Vendor access permissions

This often uncovers opportunities to strengthen security immediately. A well-managed transition also confirms that the right people have the right access at the right time, while reducing unnecessary exposure and keeping critical business services protected.



Stabilize First

The first month should focus on understanding your environment before making major changes.

Common priorities include:

Documentation review

Security validation

Backup testing

**User support
improvements**

Network assessment

Microsoft 365 review

The goal is stability, visibility, and confidence. First, we want to understand what is in place, what needs attention, and where the biggest risks are. From there, we can make thoughtful improvements that reduce disruption and set the business up for a smoother transition.



Building A Better Foundation

Once the environment is stable, attention shifts toward improvement.

This often includes:

Cybersecurity enhancements	Hardware lifecycle planning
Cloud optimization	Business continuity planning
User training	Strategic technology roadmaps

Technology should support business goals—not create obstacles. That means systems should be easy to manage, secure, and aligned with the way the business actually works, so teams can stay focused on growth instead of fighting with technology.



How Many of These Can you Confidently Answer?

- ☐ Do we know who owns our domain?
- ☐ Are our backups regularly tested?
- ☐ Do we have administrative access to Microsoft 365?
- ☐ Is MFA enabled everywhere?
- ☐ Do we have current network documentation?
- ☐ Do we meet regularly with our IT provider?
- ☐ Do we have a technology roadmap?
- ☐ Do we know our cybersecurity risks?

Score Yourself

0–3 Checks

Time for a conversation.

4–6 Checks

There may be improvement opportunities.

7–8 Checks

You're in good shape.



Why Businesses Choose IT Radix

We Believe Technology Support Should Be:



Responsive

Problems addressed quickly.



Proactive

Issues identified before they become emergencies.



Secure

Cybersecurity built into everything we do.



Strategic

Technology aligned with business goals.

For over two decades, we've helped New Jersey businesses get more value from their technology investments while reducing risk, improving productivity, and building more resilient day-to-day operations. Our goal is to make technology feel less like a burden and more like a dependable part of the business, so teams can stay focused on growth with confidence.



Not Sure If It's Time To Make A Change?

Let's have a conversation.

No pressure.

No sales pitch.

Just honest answers and
practical guidance.

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