IT SUPPORT / 01

DEFINE THE BUSINESS AND SYSTEMS

Give every provider the same non-sensitive operating context. Keep credentials and private data elsewhere.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Business, locations, operating hours, remote-work context, user groups, and coordination contacts

Device types, operating systems, ownership patterns, lifecycle stage, and approximate counts

Business applications, cloud services, file, identity, network, voice, printing, and vendor dependencies

Current support arrangement, internal roles, outside providers, documentation available, and upcoming changes

Recurring requests, known service gaps, important operating windows, and impact described without sensitive detail

My three priorities for the first IT support conversation

Preparation only. Not troubleshooting, configuration, network or security design, product selection, compliance, privacy, contract, or legal advice. Never enter credentials or sensitive data.

IT SUPPORT / 02

MAP SUPPORT SCOPE AND RESPONSIBILITIES

Separate ongoing support, projects, dependencies, and ownership before comparing proposals.

Requests, incidents, users, sites, devices, systems, hours, and after-hours situations requested

User onboarding or offboarding, device setup or retirement, account changes, and approval responsibilities

Network, cloud, voice, application, hardware, and outside-vendor coordination proposed or excluded

Discovery, onboarding, documentation, inventory, backup, monitoring, update, and reporting work proposed

Client, provider, vendor, landlord, carrier, software, hardware, and other responsibility boundaries

Projects, procurement, compliance, security work, travel, third-party fees, and other exclusions or add-ons

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IT SUPPORT / 03

PREPARE ACCESS, SECURITY, AND ESCALATION

Tick what is ready. Never put passwords, recovery codes, or sensitive system details in this pack.

- [ ] Business, locations, users, systems, vendors, and operating windows are summarized
- [ ] Current support arrangement and recurring needs are described
- [ ] Included support, projects, hours, locations, users, devices, and systems will be written
- [ ] Client, provider, vendor, and other responsibilities will be assigned
- [ ] No credentials, secrets, recovery codes, private records, or system exports are included
- [ ] Secure information exchange, approvals, authentication, and access removal will be explained
- [ ] Escalation, incident handoff, continuity, and offboarding questions are prepared
- [ ] Every provider will receive the same non-sensitive scope brief

Access approval, least-needed access, authentication, credential exchange, logging, and removal questions

Request intake, authorization, priority, communication, after-hours, escalation, and incident-handoff questions

Documentation ownership, account control, backups or monitoring if proposed, exports, transition, and offboarding questions

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IT SUPPORT / 04

QUESTIONS FOR THE IT SUPPORT PROVIDER

Record the answer and the written process, scope, responsibility chart, or term that supports it.

Discovery: how will you verify users, sites, devices, systems, vendors, documentation, and unknowns?

Scope: what support, projects, hours, locations, systems, and third-party coordination are included or separate?

Service: how do intake, authorization, priority, communication, escalation, after-hours work, and reporting operate?

Access: how are approvals, authentication, credentials, account ownership, logging, documentation, and access removal handled?

Responsibilities: who owns backups, monitoring, updates, vendors, user changes, incidents, continuity, and offboarding if included?

Terms: what implementation, dependencies, measures, complete fee structure, changes, renewal, cancellation, and exclusions apply?

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IT SUPPORT / 05

COMPARE THE SAME IT SUPPORT SCOPE

Use A and B in every box. Clarify different environment or responsibility assumptions before choosing.

Provider A / Provider B / discovery conversation, environment review, and proposal dates

Users, sites, devices, systems, vendors, support, projects, hours, intake, and escalation - A / B

Access, authentication, documentation, backups or monitoring, vendor, incident, transition, and offboarding roles - A / B

Implementation, assumptions, exclusions, service measures, complete fee structure, changes, terms, and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai and start an IT Support request if you choose; this step is optional. Share a non-sensitive summary of users, sites, devices, systems, support needs, operating windows, access boundaries, responsibilities, and handoff goals so participating pros can compete with proposals. Compare the same written scope, service process, responsibilities, complete fee structure, terms, and fit.

One request. Every pro's best offer.

Start a request

Participation varies. A non-sensitive discovery, onboarding, and access-process conversation may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/it-support

NIST: Small Business Cybersecurity Corner (official reference)

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