MANAGED IT HANDOFF / 01

BUILD THE SHARED SERVICE BRIEF

Use neutral labels and business context. Keep credentials, identifiers, configurations, vulnerabilities and incident details out.

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

Organization A / business context / no real name or address

Users and device groups / approximate range / provider to confirm

System Group A / business purpose / no account or network details

Business hours, support window or continuity priority

Requested service lanes / support, monitoring, administration or provider-defined other

Existing record title / date / custodian / private copy kept elsewhere

Preparation only. Not IT, cybersecurity, privacy, compliance, access, control, backup, recovery, monitoring, incident, contract or legal advice. Keep sensitive system details out.

MANAGED IT HANDOFF / 02

MAP BOUNDARIES, OWNERS AND ESCALATION

Ask the provider to define the actual service. Do not design access, controls, backup, recovery or response in this workbook.

Covered service / excluded service / optional service

Recurring responsibility / provider owner / client owner / other owner

Authorized access-request and approval process / written-record location

Support hours / provider-defined severity / escalation and communication path

Recurring report or review / audience / cadence / open question

Onboarding, change, transition or exit record / responsible party

Preparation only. Not IT, cybersecurity, privacy, compliance, access, control, backup, recovery, monitoring, incident, contract or legal advice. Keep sensitive system details out.

MANAGED IT HANDOFF / 03

CHECK THE PROPOSAL-READY HANDOFF

Tick what is organized. These checks do not approve an access design, control, recovery plan or incident process.

- [ ] Neutral organization, environment and system-group labels are consistent
- [ ] No credentials, account IDs, network details or vulnerabilities are recorded
- [ ] Covered, excluded and optional services are separate
- [ ] Provider, client and other-party owners are named
- [ ] Access requests and approvals have a written process
- [ ] Support hours and escalation paths are comparable
- [ ] Recurring reports and review audiences are named
- [ ] Onboarding and exit handoffs remain visible

Unresolved coverage or responsibility difference / response owner

Access, escalation or reporting question / answer reference

Transition record or decision still needed / responsible party

Preparation only. Not IT, cybersecurity, privacy, compliance, access, control, backup, recovery, monitoring, incident, contract or legal advice. Keep sensitive system details out.

MANAGED IT HANDOFF / 04

QUESTIONS FOR THE MANAGED IT PROVIDER

Ask every provider the same boundary, responsibility, access, escalation, reporting and transition questions.

Coverage: which users, devices and system groups are included?

Ownership: who owns each recurring responsibility?

Access: how are requests, approvals, changes and revocation recorded?

Escalation: what hours, severity definitions and communication path apply?

Reporting: what recurring reports and reviews are delivered?

Transition: what onboarding and exit records or assistance are included?

Preparation only. Not IT, cybersecurity, privacy, compliance, access, control, backup, recovery, monitoring, incident, contract or legal advice. Keep sensitive system details out.

MANAGED IT HANDOFF / 05

COMPARE THE SAME SERVICE BRIEF

Use Provider A and B. Clarify unlike coverage, ownership and transition duties before comparing totals.

Provider A / B / proposal dates / shared Organization A brief

Covered users, devices, systems and exclusions - A / B

Responsibility, access, escalation and reporting - A / B

Onboarding, transition, exit, timing, written terms and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Managed IT request. Share a non-sensitive Organization A, Environment A and service-boundary brief so participating pros can compete with proposals. Compare coverage, exclusions, responsibility owners, access and escalation processes, reporting, transition records, timing, written terms and fit. A private authorized-stakeholder, provider and system-record review may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. A private authorized-stakeholder, provider and system-record review may be needed before a final proposal.

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

CISA: Protecting Against Cyber Threats to Managed Service Providers and their Customers (official reference)

NIST: Small Business Cybersecurity (initial public draft) (official reference)

Preparation only. Not IT, cybersecurity, privacy, compliance, access, control, backup, recovery, monitoring, incident, contract or legal advice. Keep sensitive system details out.