

IT Provider Conversation Guide

Compare answers, not just service names. Use these questions in any provider conversation and write the answers down.

For: **Businesses comparing IT providers**

Time: **about 15 min**

Date: _____

Prepared by: _____

What is actually included?

Users, locations, devices, and applications in scope are listed in writing?

☐ Yes ☐ No ☐ Not sure

What is treated as a separate project?

Who coordinates internet, software, phone, and printer vendors?

☐ The provider ☐ Us ☐ Each vendor directly ☐ Unclear Other: _____

Notes

How does a support request move forward?

Where do staff send requests?

☐ Portal ☐ Email ☐ Phone ☐ Text the tech ☐ Unclear Other: _____

Can staff follow progress on a request?

☐ Yes ☐ No ☐ Not sure

Support hours and response arrangements are documented?

☐ Yes ☐ No ☐ Not sure

Who owns communication when another vendor is involved?

Who owns the systems and the records?

Who owns business accounts, licenses, domains, and admin access?

☐ Us (the business) ☐ The provider ☐ Mixed ☐ Not sure Other: _____

Where are device records and documentation kept, and do we get a copy?

Who approves access changes and keeps the contact list current?

Who is responsible for backups and restore checks?

How will decisions stay visible?

What is reviewed together, and how often?

☐ Monthly ☐ Quarterly ☐ Twice a year ☐ Annually ☐ Never discussed Other: _____

How are open issues and upcoming equipment changes recorded?

Who approves proposed work before it starts?

What happens to our data and documentation if we part ways?

Next step. Bring this sheet to a conversation with WOLFTRAXX SYSTEMS. Keep passwords and payment details off it. Scope, responsibilities, and any pricing are confirmed in writing. 888.758.8577 · wolftraxxsystems.com/contact