

# IT onboarding questions for providers

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Use this checklist before you sign with a managed IT provider. It helps you ask clear questions about support, security, backups, contracts, and what happens if you leave later.

<b>What this is</b>	A free, plain-language checklist from a matching service — not an IT vendor.
<b>How to use it</b>	Work through each item, jot your answers, and use them to compare providers.
<b>Cost</b>	Free. Matching is always free for businesses.

## What this checklist helps you do

If you have never hired a managed IT provider before, it is easy to compare proposals by price alone. That usually misses the most important part, which is how the provider actually works once you are a client. This checklist helps you ask the questions that affect day-to-day service.

A managed IT provider, often called an MSP, is a company that supports and manages business technology for a monthly fee. The right questions can help you understand response times, who handles security work, how backups are checked, what is included, and what costs extra.

It also helps you avoid confusion later. Many business owners only discover contract limits, slow response expectations, or offboarding problems after they sign. Asking upfront gives you a clearer picture of fit, risk, and total cost.

If you want help comparing providers after you use this list, we can help you find one at no cost to you.

## How to use this checklist

Bring these questions to every sales call. Ask the same core questions to each provider, and write down the answers in one place. That makes side-by-side comparison much easier.

Do not worry about sounding too basic. A good provider should be able to explain technical topics in plain English. If answers stay vague, rushed, or full of jargon, that tells you something important.

Ask for examples, not just promises. For example, if a provider says they respond quickly, ask what their normal response target is for urgent and non-urgent issues, and whether that target is written into the agreement.

You can also read more plain-language background in our guides and see common service types on our services page.

- Use the same questions with every provider

- Ask what is included, what costs extra, and what is optional
- Request answers in writing when possible
- Compare clarity, not just monthly price

## The questions to ask before you sign

Start with support and accountability. Ask: Who will be our main contact? Do you have a help desk, and during what hours? What are your response targets for urgent, standard, and low-priority issues? Is that written in a service level agreement, or SLA, which is the document that defines service expectations? Do you support on-site visits if needed, and what does that cost?

Then ask about tools and day-to-day management. Ask: What devices do you monitor? How do you handle patching, which means installing updates to fix bugs and security problems? Do you use remote monitoring and management, or RMM, software, which is a tool providers use to watch device health and perform routine maintenance remotely? What counts as an endpoint, meaning a business device like a laptop, desktop, or phone, under your pricing?

Next, ask about security in practical terms. Ask: Do you help set up multi-factor authentication, or MFA, which adds a second step when logging in? Do you offer endpoint detection and response, or EDR, which is software that watches devices for suspicious activity? Who reviews alerts, and during what hours? What security training or policy help do you provide? No honest provider should promise an unhackable network, but they should explain their process clearly.

After that, ask about backups, cloud systems, and recovery planning. Ask: What data is backed up, how often, and how is backup success checked? Do you follow a 3-2-1 backup approach, meaning three copies of data, on two different types of storage, with one copy kept off-site? How long are backups kept? How do you help restore files or systems after a problem? What parts are tested, and how often?

Finally, ask about contracts and the exit process. Ask: How long is the agreement? Is there a setup fee? What causes price changes? What happens if we add staff or locations? If we leave, who owns our data, licenses, documentation, and cloud tenant accounts? How do you handle offboarding, what does it cost, and how long does it usually take? A smooth exit process matters more than many buyers realize.

## Questions for regulated industries and growing businesses

If your business handles regulated information, ask how the provider supports your industry requirements. HIPAA is the US health privacy law for certain healthcare-related organizations. PCI refers to the payment card industry rules for businesses that handle card payments. SOC 2 is a reporting framework many software vendors use to describe their security controls. Requirements vary by industry and state, so ask how the provider helps coordinate with your lawyer, compliance advisor, or internal team.

If you are growing, ask planning questions too. Do they offer a virtual chief information officer, or vCIO, service, which means strategic IT planning help without hiring a full-time executive? Can they support a second office, remote staff, warehouse devices, or multiple software systems? How do they plan projects like office moves, Wi-Fi replacement, or Microsoft 365 cleanup?

You should also ask how they document your environment. Good records make support easier and offboarding safer. Ask what documentation they maintain, how it is updated, and what you receive if the relationship ends.

## What to do with the answers

Once you have answers from a few providers, look for patterns. One provider may be cheapest but vague on response times, after-hours support, or backup testing. Another may cost more but include stronger documentation, clearer onboarding, and better fit for your industry.

Pay attention to plain communication. If a provider explains things clearly before the contract, that is often a good sign for the working relationship later. If they dodge basic questions, switch topics, or avoid putting details in writing, be careful.

You do not need the most expensive option or the most technical-sounding one. You need a provider whose scope, communication style, and process match your business. Monthly cost ranges vary widely by headcount, devices, security needs, and location, and any range is not a quote. The goal of this checklist is not to pick for you, but to help you make a cleaner decision.

If you want a second set of eyes, NodeBridge IT is a free matching service. We give general education and help you find an independent managed IT provider that fits your business. We do not manage systems, access accounts, or ask for passwords.

## Quick answers

### What is the single most important question to ask an MSP?

Ask what is included in the monthly fee, what is excluded, and what commonly triggers extra charges. That one answer often reveals how predictable the relationship will be.

### Should I ask about response time or resolution time?

Ask about both. Response time is how quickly they acknowledge and begin work, while resolution time is how long it usually takes to fix the issue. They are not the same.

### Do I need to ask about offboarding before I even sign?

Yes. If you ever switch providers, you will want clear ownership of data, accounts, licenses, and documentation. A provider should be able to explain the exit process calmly and clearly.

### What if I do not understand the technical terms in their proposal?

Ask them to explain each term in plain English. A good provider should be comfortable doing that. You can also use our free matching service if you want help finding providers that communicate

