



IT PROVIDER VETTING CHECKLIST

WHAT TO ASK BEFORE YOU SWITCH

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Why This Matters

Anyone can put up a website and call themselves an IT provider. There's no license required, no board that certifies competence, and no minimum bar to clear before selling managed IT or cybersecurity to a business that has no way to evaluate what it's buying.

That doesn't mean every new or small provider is unqualified. But confidence and a good pitch aren't the same as real operational depth, and the two can be hard to tell apart from the outside.

The questions below are built to be hard to answer well without real experience, not questions a sales conversation can float through. Use this on your current provider, or on anyone you're considering switching to.

QUESTIONS THAT SEPARATE REAL EXPERIENCE FROM A GOOD PITCH

1. *"What framework do you build your security program around, and why that one instead of another?"*

What a real answer sounds like: names something specific, like CIS Controls or NIST, and explains a real tradeoff. A vague "we use best practices" with nothing behind it means there isn't one.

2. *"Walk me through the last time a client got hit with something, step by step. What happened, and what changed afterward?"*

What a real answer sounds like: a specific, sequential story. A flat "that's never happened to us" at any real scale is itself worth questioning.

3. *"How would you go about setting our RTO and RPO?"*

What a real answer sounds like: a discovery process: which systems stop the business, how long each can be down, how much data loss is tolerable, and who at your company has the authority to decide. Guessing a generic number without asking about your business means this hasn't been done before.

4. *"What's explicitly not included, and what would it cost extra?"*

What a real answer sounds like: a clear line, drawn confidently, because they've hit it before. Hedging here usually means the line was never thought through.

5. *"Tell me about a time you talked a client out of something they wanted, or a purchase they asked for."*

What a real answer sounds like: a specific example where advice ran against a sale. Struggling to name one suggests advice rarely does.

6. *"Explain how you'd protect our email from a phishing attack, without using the words 'robust,' 'seamless,' or 'best-in-class.'"*

What a real answer sounds like: a plain description of the actual controls. Reaching for buzzwords the moment they're taken away tells you what was behind the pitch.

7. *"Give me a client you stopped working with, and why."*

What a real answer sounds like: an honest, specific answer. Evasiveness here is data.

SCOPE & OWNERSHIP

- ☐ Is there a written list of what's included, or does scope stay vague until something falls outside it?
- ☐ Do they manage IT as one accountable system, or as isolated tickets?
- ☐ Do they plan lifecycle and budget ahead of time, or only react once something breaks?

SECURITY BASELINE

- ☐ Is there a written security standard every client is held to, or does it vary by relationship?
- ☐ Is MFA enforced for everyone, not just admins, with conditional access in place?
- ☐ Is Microsoft 365 licensed at a level that supports conditional access (Business Premium or equivalent), not just Basic or Standard?

SUPPORT & RESPONSE

- ☐ What are support hours, and what's the escalation path when something's urgent?
- ☐ Do they track root cause, or does the same ticket keep coming back?
- ☐ Is there a named point of contact, or whoever happens to pick up?

BACKUP & RECOVERY

- ☐ Is Microsoft 365 backed up independently, separate from Microsoft's own retention?
- ☐ Are restores tested with a real recovery, or just confirmed to be running?
- ☐ Is there a written recovery plan with a defined order of operations?

CONTRACT & EXIT TERMS

- ☐ What's the contract length, and what does renewal look like?
- ☐ If you leave, do you get documentation, credentials, and data back in a usable state?
- ☐ Is there a defined transition and offboarding process, or are you on your own?

REPORTING

- ☐ Do you get business reviews in plain language, or just a ticket count?
- ☐ Can they show evidence, not just claims, behind security and compliance answers?

Not sure how your current provider stacks up?

Schedule an IT Environment Review