



Agenda

IT Provider Cut Over Scheduling Meeting

Client:

IT Provider:

1. Greet the provider and thank them for working with us so well
2. Review the agenda.
3. Record the tool set in place currently:
 - RMM:
 - Antivirus:
 - Web Filter:
 - Spam Filter:
 - DNS Host:
 - Registrar (if not the same):
 - Backup:
 - Email:
4. Assure we have the admin credentials for:
 - Domain:
 - Hypervisor:
 - Registrar:
 - DNS Host (if different from Registrar)
 - Email:
 - Wireless Manager
5. Are you using MS Volume Licensing? Do you have the contract #'s and/or log in to the portal?
6. What are the roles of the servers?
 - XXXXX
 - XXXXX
7. What kind of MS Licensing is in place? VL? Retail? Office 365? (If retail, get log in creds) OFFICE 365 Licensing.
8. Please give an overview of the client's vertical applications:
 - XXXXX
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9. Please give an overview of the phone system:
 - If we are taking it over, get credentials.

10. Who should we send the IT Glue Invite to?
 - Contact:

11. Schedule dates and times for cut overs:
 - Antivirus:
 - Web Filter:
 - Spam Filter:
 - Backup:
 - Identify the current toolset in use: AV, web filter, spam filter.
 - Identify backup in use and when we can deploy our backup.
 - Set time for AV migration.
 - Set time for web filter deployment.
 - Set time for spam filter migration.
 - Assure we get licensing information (especially Firewall licensing)