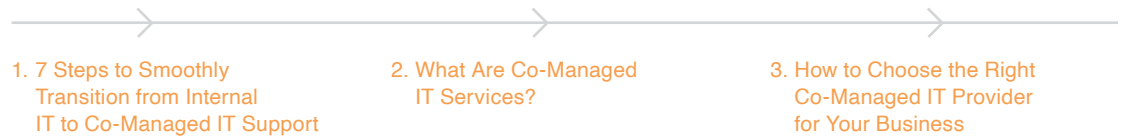


## GUIDE

# How to Quickly Transition to Co-Managed Services



Is your internal IT team struggling to keep up with the ever-growing demands of your business? It's time to consider co-managed IT support.

Transitioning from an in-house IT team to a co-managed approach doesn't have to be a daunting task. With the right strategy and partner, you can seamlessly integrate external expertise into your existing IT infrastructure.

In this guide, we'll walk you through 7 effortless steps to make the switch. From assessing your current needs to optimising your partnership, you'll learn how to:

- Utilise specialised knowledge and best practices
- Scale your IT resources with ease
- Improve your security and compliance

**Ready to take your IT game to the next level? Let's get started.**

# 1

## 7 Steps to Smoothly Transition from Internal IT to Co-Managed IT Support

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### Step 1: Assess Your Current IT Infrastructure and Needs

- Assess your current IT infrastructure and needs to identify areas for improvement
  - Research and compare co-managed IT providers to find the best fit for your organisation
  - Develop a detailed transition plan and implement the solution gradually to ensure a smooth rollout
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Before transitioning to co-managed IT support, it's crucial to thoroughly evaluate your existing IT systems, hardware, and software.

This assessment will help you identify areas where you need additional support or expertise. Take inventory of your current IT assets and document any pain points or challenges your internal IT team faces.

Consider your organisation's short-term and long-term goals, and determine how co-managed IT can help you achieve them. Assess your budget and resources available for co-managed IT services, as this will guide your decision-making process when selecting a provider.

### Conducting an IT Audit

To effectively assess your current IT infrastructure, conduct a comprehensive IT audit.

This audit should include:

- Hardware inventory: List all servers, workstations, laptops, and network devices
- Software inventory: Document all applications, operating systems, and licenses
- Network infrastructure: Map out your network topology, including routers, switches, and firewalls
- Security measures: Evaluate your existing security protocols, such as antivirus software, firewalls, and access controls

### Identifying Areas for Improvement

Based on the findings of your IT audit, identify areas where your organisation can benefit from co-managed IT support.

Some common areas for improvement include:

- Cyber security: Improving security measures to protect against threats
- Cloud migration: Moving applications and data to the cloud for scalability and accessibility
- IT strategy: Developing a long-term IT roadmap aligned with business objectives
- Help desk support: Providing 24/7 support to end-users for improved productivity

## Step 2: Define Your Goals and Expectations for Co-Managed IT

Once you have assessed your current IT infrastructure and identified areas for improvement, it's time to establish clear objectives for partnering with a co-managed IT provider.

Determine what specific services and support you require, such as help desk support, network monitoring, or cyber security management.

Set realistic timelines and milestones for the transition process, taking into account your organisation's size, complexity, and resources.

Communicate these goals and expectations to key stakeholders, including your internal IT team and executive management, to ensure everyone is aligned and supportive of the transition.

### Defining Service Level Agreements (SLAs)

When establishing goals and expectations for co-managed IT, it's essential to define Service Level Agreements (SLAs). SLAs outline the specific services your co-managed IT provider will deliver, along with performance metrics and response times.

Key components of an SLA include:

- **Service availability:** The percentage of time services will be available (e.g., 99.9% uptime)
- **Response times:** The maximum time it takes for the provider to acknowledge and respond to support requests
- **Resolution times:** The maximum time it takes for the provider to resolve issues based on severity levels
- **Performance metrics:** Measurable targets for service quality, such as network latency or application response times

## Step 3: Research and Compare Co-Managed IT Providers

With your goals and expectations clearly defined, begin researching and comparing co-managed IT providers. Look for providers with experience in your industry and with organisations of similar size and complexity.

Evaluate their service offerings, pricing models, and SLAs to ensure they align with your needs and budget.

Read customer reviews and case studies to assess each provider's reputation and track record. Reach out to references provided by the vendors to gain insights into their experiences and satisfaction with the provider's services.

### Key Factors to Consider When Selecting a Co-Managed IT Provider

When comparing co-managed IT providers, consider the following key factors:

- **Technical expertise:** Ensure the provider has the necessary skills and certifications to support your IT environment
- **Scalability:** Choose a provider that can scale their services as your organisation grows and evolves
- **Communication and collaboration:** Look for a provider with a proven track record of effective communication and collaboration with clients
- **Cultural fit:** Select a provider whose values and work ethic align with your organisation's culture

## Step 4: Communicate the Transition Plan to Your Internal IT Team

Once you have selected a co-managed IT provider, it's crucial to involve your internal IT staff in the decision-making process and communicate the transition plan clearly.

Address any concerns or questions they may have about the transition, such as job security or changes in roles and responsibilities.

Emphasise the benefits of co-managed IT for their roles and the company as a whole. Highlight how the partnership will allow them to focus on strategic initiatives while the co-managed IT provider handles routine tasks and provides additional expertise and resources.

### Conducting Training and Knowledge Transfer Sessions

To ensure a smooth transition, schedule training and knowledge transfer sessions between your internal IT team and the co-managed IT provider.

These sessions should cover:

- **Technical documentation:** Sharing existing documentation on IT systems, processes, and procedures
- **Knowledge transfer:** Transferring institutional knowledge from internal IT staff to the co-managed IT team
- **Collaborative tools:** Introducing and training on any new collaborative tools or platforms to be used during the partnership

## Step 5: Develop a Detailed Transition Plan with Your Chosen Provider

Collaborate with your chosen co-managed IT provider to create a comprehensive transition plan. This plan should outline clear roles, responsibilities, and communication channels between your internal IT team and the provider's team.

Establish a timeline for the transition, including milestones for key deliverables and checkpoints for progress reviews. Set up necessary integrations and access to your IT systems, ensuring proper security measures are in place to protect sensitive data.

### Defining Communication Protocols

To maintain effective collaboration during the transition and beyond, define clear communication protocols with your co-managed IT provider.

These protocols should include:

- **Regular meetings:** Schedule weekly or monthly meetings to review progress, discuss challenges, and align on priorities
- **Escalation paths:** Establish clear escalation paths for issues that require immediate attention or higher-level decision-making
- **Reporting and metrics:** Define the format and frequency of performance reports and metrics to be provided by the co-managed IT provider

## Step 6: Implement the Co-Managed IT Solution Gradually

To minimise disruption to your operations, implement the co-managed IT solution gradually. Begin with a pilot project or a phased approach, focusing on specific areas or departments before rolling out the solution organisation-wide.

Provide training and support to your internal IT team throughout the transition, ensuring they are comfortable with new processes and tools. Monitor progress closely and make adjustments as needed to ensure a smooth rollout.

### Monitoring and Measuring Success

As you implement the co-managed IT solution, establish metrics to monitor and measure success.

These metrics may include:

- Service desk response and resolution times
- Network performance and uptime
- Cyber security incidents and threat detection
- User satisfaction and feedback

Regularly review these metrics with your co-managed IT provider and make data-driven decisions to optimise the partnership.

## Step 7: Regularly Review and Optimise Your Co-Managed IT Partnership

Once the co-managed IT solution is fully implemented, schedule regular meetings with your provider to discuss performance, challenges, and opportunities for improvement. Continuously assess the effectiveness of the partnership against your predefined goals and expectations.

As your business needs evolve over time, adapt your co-managed IT strategy accordingly. Work closely with your provider to identify new areas for optimisation and innovation, ensuring your IT infrastructure remains aligned with your organisational objectives.

### Conducting Regular Satisfaction Surveys

To gauge the success of your co-managed IT partnership, conduct regular satisfaction surveys among end-users and stakeholders.

These surveys should assess:

- Service quality and responsiveness
- Communication and collaboration effectiveness
- Overall satisfaction with the co-managed IT provider

Use the insights gathered from these surveys to identify areas for improvement and to inform strategic decision-making regarding your co-managed IT partnership.

By following these seven steps and continuously optimising your co-managed IT partnership, you can ensure a smooth transition from internal IT to a successful co-managed IT support model that drives business growth and innovation.

## Strategies for Addressing Staff Concerns

1. Schedule one-on-one meetings with each IT team member to discuss their concerns and provide reassurance about their role in the organisation.
2. Organise training sessions and workshops that showcase the benefits of working with a co-managed IT provider and the opportunities for skill development.
3. Create a clear plan for how responsibilities will be divided between internal IT and the co-managed provider, emphasising the importance of collaboration and teamwork.

## Overcoming Common Challenges When Moving to Co-Managed IT Support

- Identify and address potential obstacles early in the transition process
- Develop strategies to maintain clear communication and accountability
- Create a collaborative environment that benefits both internal IT and the co-managed provider

### Resistance from Internal IT Staff

One of the most significant challenges when moving to a co-managed IT support model is the potential resistance from internal IT staff.

This resistance often stems from concerns about job security and changes in responsibilities. To address these concerns, it's essential to have open and honest conversations with your IT team.

Highlight the opportunities for skill development and career growth that come with working alongside a co-managed IT provider.

Emphasise that this collaboration can expose them to new technologies, best practices, and industry trends, ultimately enhancing their value to the organisation. Additionally, reassure your internal IT staff that their roles are not being replaced but rather supplemented by the expertise of the co-managed provider.

Another way to alleviate resistance is to emphasise the benefits of reduced workload and access to specialised expertise. Many internal IT teams are overwhelmed with day-to-day tasks, leaving little time for strategic initiatives or professional development.

By partnering with a co-managed IT provider, your internal staff can focus on high-priority projects while the provider handles routine maintenance and support tasks.

## Integration with Existing IT Systems and Processes

Another challenge when moving to a co-managed IT support model is ensuring seamless integration with your existing IT systems and processes. This integration is crucial for maintaining data security, access control, and incident response.

To overcome this challenge, work closely with your co-managed IT provider to develop a comprehensive integration plan. This plan should include a thorough assessment of your current IT infrastructure, identifying any potential compatibility issues or security vulnerabilities.

Once these issues are identified, collaborate with your provider to develop solutions that align with your organisation's goals and requirements.

Establishing clear protocols for data security, access control, and incident response is also essential.

Your co-managed IT provider should have extensive experience in implementing industry-standard security measures and can help you develop policies and procedures that protect your sensitive data and systems.

## Communication and Accountability Best Practices

1. Schedule weekly or bi-weekly status meetings with your co-managed IT provider to review progress, discuss challenges, and plan for upcoming initiatives.
2. Implement a centralised ticketing system that allows both internal IT and the co-managed provider to track and manage user requests, ensuring that no issues fall through the cracks.
3. Develop a clear set of service level agreements (SLAs) that define response times, resolution targets, and escalation procedures for different types of issues, ensuring that everyone is held accountable for meeting these standards.

## Best Practices for Seamless Integration

1. Conduct a thorough inventory of your existing IT systems and processes, documenting any custom configurations or legacy applications that may require special attention during the integration process.
2. Develop a detailed project plan that outlines the steps required for integration, including milestones, timelines, and responsibilities for both internal IT and the co-managed provider.
3. Regularly review and update documentation and procedures as needed to ensure that all team members have access to the most current information and can effectively collaborate on IT initiatives.

## Maintaining Clear Communication and Accountability

Effective communication and accountability are essential for the success of any co-managed IT support partnership.

Without clear lines of communication and well-defined roles and responsibilities, misunderstandings and conflicts can arise, leading to delays, errors, and frustration for both internal IT and the co-managed provider.

To maintain clear communication and accountability, establish regular meetings and reporting mechanisms with your co-managed IT provider. These meetings should include status updates on ongoing projects, discussions of any issues or concerns, and planning for future initiatives.

By maintaining open lines of communication, you can ensure that everyone is working towards the same goals and that any potential problems are addressed quickly and effectively.

Another critical aspect of maintaining accountability is defining escalation paths and decision-making processes for critical issues.

This includes identifying key stakeholders within your organisation and the co-managed IT provider who have the authority to make decisions and resolve conflicts. By establishing these processes upfront, you can minimise confusion and delays when critical issues arise.

Finally, ensure that both internal IT and the co-managed provider have a shared understanding of goals and expectations. This includes defining clear metrics for success, such as response times, resolution rates, and user satisfaction scores.

By aligning everyone around a common set of objectives, you can create a collaborative environment that drives continuous improvement and innovation.

The role of a copyeditor is to collaborate with authors to create the best possible version of a text.

This includes tasks such as:

1. **Clarifying Structure and Coherence:** Adjusting the organisation of sections and subsections to improve readability and flow.
2. **Tone and Language:** Ensuring the tone is appropriate for the publisher or series, suggesting revisions for inclusive language, and addressing potential biases.
3. **Fact-Checking and Verification:** Querying authors about inconsistencies or suspected errors, performing light fact-checking, and ensuring documentation of sources is complete.
4. **Applying House Style:** Ensuring consistency in formatting and styling according to established guidelines.
5. **Correcting Errors:** Correcting misspellings, punctuation, and grammatical errors, and suggesting improvements to word usage.
6. **Collaboration and Feedback:** Providing authors with the opportunity to review and suggest corrections, and revising the manuscript accordingly.

This involves:

1. **Fact-Checking and Updates:** Verifying facts and figures, updating them if necessary, and citing sources inline.
2. **Maintaining Format:** Preserving the markdown format and readability enhancements like H2, H3, and H4 headers.
3. **Addressing Manual Checks:** Performing additional fact-checking and adding supplementary information as hinted in the manual check blocks.
4. **Converting Key Terms to Links:** If reliable sources are found, converting key terms to reference links for further explanation.

The goal is to update the content without altering its core message, ensuring it remains accurate and informative for the readers.



# 2 What Are Co-Managed IT Services?

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- Co-managed IT combines an internal IT team with an external provider for improved capabilities
  - It offers a flexible, collaborative approach compared to fully managed IT services
  - Typical services include help desk support, network management, cyber security, and IT strategy
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## Definition and Key Characteristics

Co-managed IT services involve partnering with an external IT provider while maintaining an internal IT team. This collaborative approach allows organisations to augment their existing IT capabilities and expertise without completely outsourcing their IT functions.

The external provider works closely with the internal team, sharing responsibilities based on agreed-upon roles and objectives.

The key characteristic of co-managed IT is the strategic division of tasks between the internal team and the external provider. This division is tailored to the specific needs and goals of the organisation, ensuring that the strengths of both parties are utilised effectively.

For example, the internal team may focus on business-specific applications and processes, while the external provider handles infrastructure management and cyber security.

## Benefits of Co-Managed IT

Co-managed IT offers several benefits to organisations, including:

1. Access to specialised expertise and resources
2. Increased flexibility and scalability
3. Improved efficiency and productivity
4. Cost optimisation through shared responsibilities

By combining the knowledge of the internal team with the expertise of the external provider, organisations can achieve a more comprehensive and effective IT strategy.

## Comparison with Fully Managed IT Services

While co-managed IT services involve a partnership between an internal team and an external provider, fully managed IT services involve outsourcing all IT functions to an external provider.

In a fully managed model, the external provider takes complete responsibility for the organisation's IT operations, from help desk support to strategic planning.

Co-managed IT, on the other hand, allows organisations to maintain control and ownership of certain IT aspects while still benefiting from external expertise. This approach provides a more flexible and collaborative framework, enabling the organisation to adapt its IT strategy as business needs change.

## Advantages of Co-Managed IT over Fully Managed Services

- **Understanding institutional knowledge:** With co-managed IT, the internal team remains involved, preserving valuable institutional knowledge and ensuring business continuity.
- **Customised solutions:** Co-managed IT allows for tailored solutions that align with the organisation's specific requirements and goals.
- **Gradual transition:** Organisations can gradually shift towards more extensive external support as needed, reducing the risk of a disruptive transition.

## Typical Services Offered by Co-Managed IT Providers

Co-managed IT providers offer a wide range of services to support and improve an organisation's IT capabilities.

Some of the typical services include:

- 1. Help desk and technical support:** Providers offer user support services, addressing technical issues and ensuring smooth operation of IT systems.
- 2. Network and infrastructure management:** Co-managed IT providers monitor, maintain, and optimise the organisation's network infrastructure to ensure reliability and performance.
- 3. Cyber security and data protection:** Providers implement and manage security solutions to protect the organisation's data and systems from cyber threats. Examples of cyber security solutions include firewalls, intrusion detection systems, and endpoint protection.
- 4. Cloud migration and management:** Co-managed IT providers assist organisations in migrating to cloud-based solutions and managing cloud environments for optimal performance and cost-efficiency.
- 5. IT strategy and planning:** Providers work with the internal team to develop and implement long-term IT strategies that align with business objectives. This alignment is crucial for ensuring that IT investments support the organisation's overall goals.
- 6. Software development and integration:** Co-managed IT providers can assist with custom software development and integration of various business applications to streamline processes and improve productivity.

By offering a comprehensive suite of services, co-managed IT providers enable organisations to fill gaps in their IT capabilities and focus on their core business objectives.

# 3

## How to Choose the Right Co-Managed IT Provider for Your Business

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### Key Factors to Consider When Evaluating Providers

- Evaluate potential providers based on industry experience, service offerings, pricing, and reputation
  - Ask key questions about integration, SLAs, security, onboarding, and success metrics
  - Watch out for red flags like lack of transparency, poor communication, and inflexible terms
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When choosing a co-managed IT provider, it's essential to consider their industry experience and specialisation. Look for a provider that has a proven track record of working with businesses in your industry and understands the unique challenges and requirements you face.

This ensures that they can provide tailored solutions and valuable insights to support your specific needs.

Next, evaluate the provider's service offerings and flexibility. A good co-managed IT partner should offer a wide range of services that complement your internal IT team's capabilities. This may include network monitoring, cyber security, cloud management, and helpdesk support.

Additionally, they should be flexible in their approach, allowing you to scale services up or down as your business needs change.

Pricing models and contract terms are another critical factor to consider. Look for a provider that offers transparent pricing without hidden fees or long-term commitments.

Some providers may offer a pay-as-you-go model, while others may have fixed monthly fees based on the services you require. Ensure that the pricing aligns with your budget and that the contract terms are fair and flexible.

### Reputation and Customer References

When evaluating a co-managed IT provider, it's crucial to research their reputation and seek out customer references. Look for online reviews, testimonials, and case studies that highlight the provider's expertise and customer satisfaction.

Reach out to their existing clients in your industry to gain insights into their experience working with the provider.

### Technical Expertise and Certifications

Assess the technical expertise and certifications of the provider's team. Look for a provider that employs highly skilled technicians with relevant certifications from industry-recognised organisations like CompTIA, Microsoft, and Cisco. This ensures that they have the knowledge and skills necessary to effectively manage and support your IT infrastructure.

## Questions to Ask Potential Co-Managed IT Partners

When engaging with potential co-managed IT partners, ask specific questions to gauge their suitability for your business. Inquire about their process for ensuring seamless integration with your internal IT team.

A good provider should have a well-defined onboarding process that includes documentation, knowledge transfer, and regular communication to ensure a smooth transition.

Discuss their service level agreements (SLAs) and response times. SLAs outline the provider's commitments to uptime, response times, and resolution targets.

Ensure that the SLAs align with your business requirements and that the provider has a track record of meeting or exceeding these commitments.

Data security and compliance are critical concerns for any business. Ask potential providers about their approach to data security and how they ensure compliance with relevant regulations such as HIPAA, PCI-DSS, or GDPR.

They should have strong security measures in place, including encryption, access controls, and regular security audits.

Inquire about their process for onboarding and transitioning to co-managed IT. This should include a detailed plan for assessing your current IT environment, identifying areas for improvement, and implementing necessary changes.

The provider should also have a clear communication plan to keep your internal IT team and stakeholders informed throughout the process.

Finally, ask how they measure and report on the success of the co-managed IT partnership. Look for a provider that offers regular reporting and performance metrics to demonstrate the value they deliver.

This may include key performance indicators (KPIs) like response times, resolution rates, and customer satisfaction scores.

## Red Flags to Watch Out for When Selecting a Provider

When evaluating co-managed IT providers, be aware of potential red flags that may indicate a poor fit for your business. One major red flag is a lack of transparency in pricing or service offerings.

If a provider is unwilling to provide clear and detailed information about their pricing structure or the specific services included in their packages, it may be a sign that they have hidden costs or limitations.

Poor communication or responsiveness during the evaluation process is another warning sign. If a provider is slow to respond to your inquiries or provides vague or evasive answers to your questions, it may indicate a lack of professionalism or a potential communication breakdown in the future.

Insufficient experience or expertise in your industry or specific technologies is also a red flag. While a provider may have general IT knowledge, they should also have a deep understanding of the unique challenges and requirements of your industry.

If they lack this specialised expertise, they may struggle to provide the tailored solutions and support your business needs.

Negative reviews or feedback from current or past clients should also raise concerns. While no provider is perfect, a pattern of negative reviews or complaints may indicate underlying issues with their service quality, reliability, or customer support.

Finally, be wary of providers that offer inflexible contract terms or a one-size-fits-all approach to co-managed IT. Your business needs may change over time, and a good provider should be willing to adapt and scale their services accordingly.

If a provider insists on long-term commitments or rigid service packages, it may limit your ability to adjust your IT strategy as your business evolves.

### Understanding the Difference Between Managed and Co-Managed IT Services

When considering IT support options, it's essential to understand the difference between fully managed IT services and co-managed IT services. Managed IT services involve outsourcing all of your IT operations to a third-party provider.

This means that the provider takes complete responsibility for managing, monitoring, and maintaining your IT infrastructure, applications, and security.

On the other hand, co-managed IT services involve partnering with a provider to supplement your internal IT team's capabilities.

With this approach, your internal IT staff continues to manage certain aspects of your IT environment while the co-managed IT provider handles specific tasks or provides additional expertise and resources.

Co-managed IT services offer several advantages over fully managed services. First, they allow you to maintain control over your IT strategy and decision-making while still benefiting from the expertise and support of a third-party provider.

This can be particularly valuable if you have unique business requirements or compliance needs that require a high degree of customisation.

Second, co-managed IT services can be more cost-effective than fully managed services, as you only pay for the specific services and support you need. This can help you optimise your IT budget and allocate resources more efficiently.

Finally, co-managed IT services can provide greater flexibility and scalability than fully managed services.

As your business needs change, you can easily adjust the level of support and services you receive from your co-managed IT partner without having to completely overhaul your IT infrastructure or support model.

# Embracing the Future of IT Management

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Transitioning from internal IT to co-managed IT support doesn't have to be a daunting task. By following these 7 steps, you can ensure a smooth and effective transition that benefits your business and IT team.

Assessing your current infrastructure, defining clear goals, and selecting the right provider are key to success.

Co-managed IT offers numerous advantages, including access to specialised expertise, improved scalability, and strengthened security.

By using the knowledge and resources of a trusted partner, you can focus on core business objectives while ensuring your IT systems remain reliable and efficient.

## Ready to Take the Next Step?

If you're considering co-managed IT for your organisation, now is the time to act. Schedule a consultation with a reputable provider to discuss your specific needs and objectives.

They can help you develop a tailored plan that aligns with your business goals and budget.

What's holding you back from exploring the benefits of co-managed IT for your company?

Contact [F12](#) today for a free consultation and discover the benefits of co-managed IT services for your business.