



CHECKLIST

# Managed IT Buyer's Checklist for Chicago Businesses

Gather these facts before you talk to any managed IT provider.

A provider can only quote what it can see. Use this checklist to collect the facts that shape scope and price, so every provider you meet is answering the same questions. Side 2 lists the questions to ask each one.

## Your organization

- ☐ Number of users and devices (laptops, desktops, phones, servers)
- ☐ Sites in Chicago and the suburbs, plus any sites in other states
- ☐ Line of business software your staff can't work without

## Key dates

- ☐ Move date or new lease start
- ☐ Your IT person's last day, if they are retiring or leaving
- ☐ Your current IT agreement renewal date

## Who holds the keys today

- ☐ Admin passwords for Microsoft 365 (M365), the firewall, the domain registrar and backups
- ☐ Admin access to line of business apps
- ☐ Where your network and system documentation lives, if it exists

## Current vendors

- ☐ Internet service providers (ISPs) and circuit renewal dates
- ☐ Phones, cameras, access control and alarm monitoring
- ☐ Software subscriptions and who manages each one

## Security, compliance and insurance

- ☐ Requirements you must show evidence for, such as the Payment Card Industry Data Security Standard (PCI DSS) or the Federal Trade Commission (FTC) Safeguards Rule
- ☐ Your latest cyber insurance questionnaire
- ☐ Customer security reviews you have to answer

## AI use today

- ☐ Which artificial intelligence (AI) tools staff use, and who uses them
- ☐ Per-seat AI add-ons, tokens and credits you pay for

## Which path are you on?

|                                            |                                                                                                                   |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| Moving or expanding                        | A new office or site needs network, cabling, Wi-Fi, internet, phones, cameras and access control on one timeline. |
| IT person retiring, or switching providers | Plan the handover while they are still here: document systems, credentials, vendors and renewal dates.            |
| Outsource and automate with AI             | Outsource IT labor and automate repeatable work, with a person accountable for the result.                        |
| Co-managed with your IT team               | Keep your IT staff and add depth, with a written responsibility matrix.                                           |
| Existing BTI client adding IT              | Keep your BTI phone and security services and add IT as new, separate lines.                                      |

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Chicago managed IT [312-492-2613](tel:312-492-2613) | [btigroup.com/freeconsultation/](https://btigroup.com/freeconsultation/)  
BTI Chicagoland office: 1441 Branding Ave, Suite 200, Downers Grove, IL 60515

## COMPARE PROVIDERS

# Questions to ask every provider

Ask each provider the same questions and compare the answers side by side.

- |                                                                                                      |                                                                                                                   |
|------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Who answers when we call? Who comes on site in Chicagoland, and from where? | <input type="checkbox"/> How will you work with our internal IT person? Is there a written responsibility matrix? |
| <input type="checkbox"/> What is monitored around the clock, and who responds?                       | <input type="checkbox"/> Who owns the documentation of our environment?                                           |
| <input type="checkbox"/> Is every service priced on its own line, or bundled?                        | <input type="checkbox"/> Can the same team handle our network, phones, cameras and access control?                |
| <input type="checkbox"/> Do you pick equipment for our needs, or sell one vendor's line?             | <input type="checkbox"/> How is AI governed, and where does our data live?                                        |

## Terms you will hear

**MSP (managed service provider):** a company that runs and supports your technology for a recurring fee.

**NOC (network operations center):** a team that monitors networks, servers and internet circuits around the clock.

**SOC (security operations center):** a team that monitors security alerts around the clock and contains threats.

**24/7 NOC/SOC:** network and security monitoring combined, 24 hours a day, 7 days a week.

**vCIO (virtual chief information officer):** a part-time IT leader who plans technology and budget with you.

**vCISO (virtual chief information security officer):** a part-time security leader who sets security strategy and policy.

**RMM (remote monitoring and management):** software that monitors, patches and fixes devices remotely.

**MDM (mobile device management):** software that manages and secures phones, tablets and laptops.

**EDR (endpoint detection and response):** security software on each device that detects and stops threats.

**MDR (managed detection and response):** EDR plus people who watch alerts and respond for you, around the clock.

**MFA (multi-factor authentication):** signing in with a password plus a second proof, such as a phone prompt.

**SLA (service level agreement):** the written service commitments in your contract.

**M365 (Microsoft 365):** Microsoft's suite of Outlook email, Teams, SharePoint, OneDrive and Office apps.

**Azure:** Microsoft's cloud platform for servers, storage and AI.

## Where BTI fits

BTI provides fully managed and co-managed IT to Chicago organizations from our Chicagoland office in Downers Grove: local engineers, a 24/7 NOC/SOC watching your systems, and a proposal that itemizes every line. Managed IT runs \$60 to \$290 per user per month, with financing from 4% for qualified infrastructure projects. BTI has been in business for over 40 years, is ISO 27001 compliant, and is a Cisco Select Partner and Microsoft Partner.

**The first consultation and the initial IT assessment conversation are free. The assessment scope is set on the initial engineering consult call.**

**Other abbreviations used:** M365, Microsoft 365. ISP, internet service provider. PCI DSS, Payment Card Industry Data Security Standard. FTC, Federal Trade Commission. AI, artificial intelligence. ISO 27001, the international standard for information security management.

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