Questions to Ask When Evaluating a Local IT Provider
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The complexity of an Accounting firm environment is difficult to understand, let alone implement and manage, unless an IT services provider has substantial experience supporting Accounting firms.

Unfortunately, many firms don't realize until after they've signed the papers that the provider they've chosen doesn't have as much experience supporting Accounting firms as they thought.

Oftentimes, firms don't know what questions to ask to gauge a provider's ability to handle the complexity of an Accounting firm environment. We've put together a list of questions designed to help you uncover potential issues, assess your options and find the best solution for your firm.

**IT Helpdesk**

- Please describe your support infrastructure and if we will be assigned a dedicated consultant for both technology and the overall relationship.
- Please describe your helpdesk features.
- Please describe your helpdesk ticketing system and how our firm will interact with it including support response, escalation and comprehensive reporting.
- Please provide helpdesk response times over the past year.
- Please provide your weekday, weekend and tax season support hours.
- Please describe your after-hours and emergency support including how escalation works.
- Please describe how support works for special requests.
- Please provide your maintenance hours.
- Please describe the number of helpdesk support staff and capabilities.
- Please describe the training and education for your support team.
- Please provide your Service Level Agreement and Scope Document.

**Application Support**

- Please describe your core competency as it relates to applications.
- Please describe your application support with our firm's core applications (such as CCH Engagement, ProSystem Tax, QuickBooks, etc.).
- Does each version of each application we use count as a separate application? For example, do you price all 7 years of Lacerte tax (1040/1065/1120) as 1 application or 7 separate ones?
- What experience do you have in working with our core applications? Are you able to make all my applications work in your environment?
- Who does the tax updates? How often and when are updates done and will that kick us out of the system?
- How many application servers do you have us in? Are they virtual machines?
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Remote Access

☐ Please explain your remote access solution. Does your remote access solution allow your clients to work out of office like in office if they have internet access?
☐ Are you able to make all our applications work remotely?
☐ How many monitors does your network support? Does this include remote access for multiple monitors?

Technology Platform

☐ What differentiates your platform?
☐ Please explain how we can add and delete users.
☐ Please describe the training our firm will receive.
☐ How do you support the local machines and other local hardware?
☐ What type of storage is being used?
☐ How do you monitor our internet connectivity?
☐ How much time do you spend on-site at our office(s) during cut-over?
☐ What is the transition process for moving all our data to the cloud?

Reliability

☐ Please describe your system downtime procedures including communication protocols, preventative measures and post incident explanation.
☐ Please provide statistics on your planned and unplanned downtime that has occurred over the past two years.
☐ Please describe the actions you take to ensure the reliability of your system.
☐ Please provide references for other Accounting firms with this big of an application footprint in your system.
☐ Please provide references for Accounting firm clients using our applications on your platform.

Security

☐ Please describe your data security standards and protocols for both our firm and your employees.
☐ Please describe your metrics monitoring systems and audit practices.
☐ Please describe your backup guidelines, data accessibility and file restoration methods.
☐ Please describe your confidentiality policy.
☐ Please describe your third-party relationships and privacy rules.
Company Information

- Please provide contact information for the key people in your organization.
- Please provide a brief history of your company, including location of your corporate headquarters and offices.
- How long have you been in business?
- How long have you been providing network infrastructure and related services to Accounting Firms?
- How many current Accounting firm clients do you have?
- Describe your core product and service lines.
- Describe what differentiates you from your competitors.
- How do you solicit communications and feedback from users?
- Please describe your pricing approach and what we can do to reduce costs.

This list will go far in helping your firm make an informed decision. Technology affects every aspect of your firm. You owe it to your firm to be asking the right questions before making such an important decision that will affect the future of your firm. And if any of the answers raise a red flag about a provider’s ability to support your firm, we recommend looking elsewhere.
Learn more at www.rightnetworks.com