

# How to Migrate Off Rightworks: A Practical Guide for Bay Area SMBs

Many small and mid-sized businesses in the San Francisco Bay Area originally adopted Rightworks to enable remote access to QuickBooks and other line-of-business software. But as cloud platforms evolve, hosted desktops like Rightworks are becoming more expensive, harder to support, and less compatible with modern workflows.

This guide outlines the common reasons why businesses are leaving Rightworks, how to manage the transition internally, and how IT Total Care delivers a smoother migration experience from start to finish.

## 1. Why Bay Area Businesses Are Migrating Off Rightworks

Rightworks once served as a helpful bridge for SMBs moving from on-premise to hosted IT, but many businesses have since outgrown its limitations. Whether you're facing performance issues or shifting to cloud-native tools, maintaining a hosted desktop may no longer align with your needs.

### Why Companies Are Moving On:

- **Cloud Adoption Has Changed the Game:** Many businesses have moved to QuickBooks Online, Microsoft 365, or Google Workspace. A hosted desktop is no longer required to access essential tools.
- **Performance and Support Issues:** Hosted environments can be slow and unreliable. Rightworks support response times and platform stability have become a common frustration for users.
- **Integration Challenges:** Newer tools like cloud-based CRMs, payroll apps, and communication platforms often can't integrate cleanly with a hosted desktop.
- **Rising Costs:** As Rightworks pricing continues to climb, businesses are evaluating whether the value still matches the spend.
- **Security and Control:** Businesses want more visibility and ownership over their Microsoft environment, rather than having it managed entirely by a third-party hosting company.

## 2. How to Migrate Off Rightworks Yourself

If you plan to handle your Rightworks exit internally, you'll need to coordinate with their support team, build a technical plan, and manage both software replacements and user access updates.

### Step 1: Contact the Rightworks Exit Team

- Start the process by requesting a full breakdown of your current configuration, licensing, and service scope.

### Step 2: Get Access to Your Microsoft Environment

- Ask Rightworks to transfer administrative access to your Microsoft 365 tenant. This is critical for managing email, user profiles, and cloud resources after cutover.

### Step 3: Set Up a Replacement Platform

- Prepare new environments for file access, software, and identity management. This could be SharePoint, a local file server, or another cloud solution.

### Step 4: Receive and Migrate Your Data

- Rightworks will ship you a physical hard drive containing your hosted environment. Migrate files to their permanent location using your new structure.

### Step 5: Replace Software and Security Tools

- You'll need to replace all third-party services previously bundled in your Rightworks subscription, including antivirus, PDF tools, email security, and cybersecurity training.

**Limitations:** Handling a migration without IT support can lead to errors, downtime, or incomplete transitions. Businesses often struggle with missing administrative permissions, licensing confusion, and delays caused by unclear communication with Rightworks support.



### 3. How IT Total Care Streamlines the Migration Process

At IT Total Care, we take full ownership of your Rightworks transition to ensure a seamless, stress-free migration that minimizes disruption to your business.

#### Our Rightworks Migration Process Includes:

- **Project Planning and Exit Coordination:** We engage directly with Rightworks to retrieve your configuration and prepare your environment for migration.
- **Timeline Visualization:** A detailed Gantt chart outlines milestones, dependencies, and cutover scheduling for full transparency.
- **Weekly Syncs with Your Team:** We manage logistics and align with your leadership team on data handling, user communication, and timing.
- **Microsoft 365 Rebuild and Ownership:** We secure full admin control of your tenant and rebuild it within SharePoint based on your current workflows and user access needs.
- **Software Replacement:** We deploy our own stack of security and productivity tools, including:
  - Business-class antivirus and EDR
  - Cloud-based email filtering and encryption
  - Cybersecurity awareness training
- **Zero-Downtime Cutover:** On migration day, we ensure services stay live and uninterrupted while shifting control of your Microsoft environment.
- **Secure Data Migration:** Once your Rightworks drive arrives, we upload all legacy files to your new platform with full directory mapping and permission control.
- **Microsoft Entra ID Integration:** We connect all user profiles to modern identity management, enabling secure access from anywhere.
- **Post-Migration Optimization:** We audit your licenses, eliminate waste, and adjust subscription levels to improve your Microsoft ROI.

**Migrating off Rightworks can unlock faster workflows, better integration, and greater control of your IT environment.** Whether you've already moved to the cloud or are just starting to explore your options, **IT Total Care** can help you make the transition cleanly and confidently. Our team ensures every step is aligned with your business goals, user needs, and long-term IT strategy.

Let's modernize your IT and eliminate unnecessary costs. **Contact us today** to learn more.