16 QUESTIONS

you need to ask when evaluating a new IT Provider

WIRED for the FUTURE

01 Why should we work with your MSP?

Start with the low hanging fruit: let's hear their pitch. Why should your company, specifically work with their MSP? Be on the lookout for canned or generic answers that they say to everyone. If they answer with specifics about your business or industry, that's a step in the right direction. It's a good sign if they're doing their homework prior to making the sale.

02 Why shouldn't we work with your MSP?

We've only been asked this question once, but it definitely put us into deep thought. It's a variation of the classic, "what is your greatest weakness?" If they say nothing, then you may want to question the transparency of this organization. No company is 100% perfect and even the most distinguished client needs a reminder of that. If they give you an honest and open answer, it should count for them, not against them, unless of course it's truly concerning.

03 What are the biggest challenges to a strong partnership?

This question goes for both parties. Take a second to really hear what challenges could arise in the partnership. For instance, some clients want things immediately, but are not always willing to wait. Getting honest feedback will start the partnership off on the right foot.

04 How does the escalation process work? What if I am not satisfied with the response/resolution time of a particular service ticket or project?

This is very critical. There are probably going to be times when the Help Desk may not escalate to higher tiers quick enough, going back to the point made about no company being 100% perfect. Prioritization often comes from the MSP. However, what if you want to supersede this decision? What does the escalation process look like? Do you have an account manager that's there to help with more than just pitch a sale onto you?

05 What end user training do you provide (other than cybersecurity awareness training)?

Every MSP *should* provide end user cybersecurity training. Are there any other resources that they offer to benefit your organization? This could be a massive value add without needing to pay extra. For instance, we have multiple tech tip suggestions for end users that enable them to better use their Microsoft products and other productivity training. This can be rare and should be a focal question your pose to a potential MSP partner.

06 What reports are sent to the management team, and what is the cadence?

You should receive monthly reports and this is non-negotiable. While it is a partnership and you do trust that your provider is monitoring and managing your systems, getting reports will help you keep a detailed gauge on what is (and maybe isn't) getting done. If they don't have an answer to this question, or they don't provide any reports, this is a red flag that they are not the best fit for your organization.

07 What does the onboarding experience look like with your MSP?

A professional and organized MSP should have a defined onboarding process in place. Ideally, this should be a checklist that covers every relevant aspect of the technology at your business. For example, a specific timeline on how long the process should take, what procedures entail on day one, week one, month one, etc. If they have no standardized process for this, that is a huge red flag. If their response is "we'll get to it soon" or "you're second in line", that's a definite reason to be weary and careful. It's quite normal to not be first in line, but it's unacceptable if they are not defined expectations that they can set on a start and end date.

08 What do you believe your differentiators are compared to other MSPs?

First off, "good customer service" is not exactly a differentiator because anyone can make this claim. Instead, simply ask them what makes them different, and pay attention to how they respond. Listen carefully to see if their differentiators actually help your business concerns, or if they're rehashing generic sales speak. If what separates them from their competitors provides real value, then that should weigh into the final decision.

09 Do you use in-house or contracted resources for services?

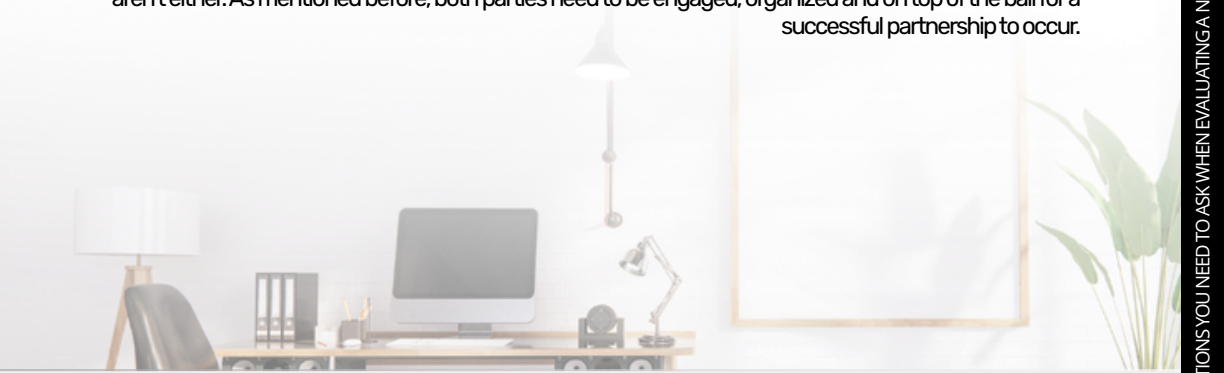
Most MSPs use in-house technicians and support (like us). However, it's always good to make sure. If they are outsourcing a lot of their support, it's important to know. It's not always a complete deal breaker, but it doesn't hurt to ask more questions. Where are these resources? Are they in different countries? If so, what cybersecurity practices are they putting in place to make sure your systems and our data is protected from their overseas resources?

10 What would you need for a smooth and efficient transaction to your service (specific credentials, staff list, security level, etc.)?

Not a super technical question, but this is considered a "Runbook". Understanding exactly what they'll need before signing up will make the transition easier. So, make sure to get a defined list from your current IT provider to hand over to your new MSP partner.

11 How often do you meet with your clients for future planning?

Make sure that you set the expectation early on that you require ongoing planning. As your technology is a key component in daily operations, don't let your IT provider procrastinate on meetings, but make sure you aren't either. As mentioned before, both parties need to be engaged, organized and on top of the ball for a successful partnership to occur.



12 We were just hit with ransomware, what are the next steps? What would the "Disaster Recovery" process look like?

Most MSPs do a fantastic job of protecting your technology. They put many protective layers in place to keep out ransomware and any other threats to your business. However, the most effective MSPs have a defined response. Make sure to ask this question so you can ensure that there will be a plan in place to get your business running, and know how quickly that can happen if an attack does occur. No MSP in the world can guarantee you won't ever be hit with a cyberattack, and if they do, be weary because that is a bold claim. However, they can prepare an effective plan to get you back up and running as quickly and effectively as possible. If they struggle answering this question with confidence in their abilities, on to the next.

13 You just hired a new employee and they receive a ticket from us. What did their onboarding look like to ensure that they are ready and able to effectively manage that request?

You've probably caught on that most of these questions are meant to identify if the MSP you're scouting is process-driven. Finding this out early on will help you to avoid the pitfalls that many businesses fall into when choosing the wrong provider. We always make sure to ask our clients, "what were you struggling with before working with us?" They explain their current concerns and that's exactly what we strive to address in our own services.

14 How often do you raise your rates?

The contract that you sign with an MSP will most likely have clear verbiage stating how often you can expect service costs to go up. By asking this question, you can filter out MSPs that are aggressive with raising their rates. This doesn't necessarily have to be a deal breaker, but its doubtful that you'd want to have to restart the search for a new MSP partnership every couple of years due to being priced out.

15 How do you monitor customer satisfaction and quality assurance on an ongoing basis?

Is there a process in place to ensure your end users are satisfied and staying productive? If they have a clear process of continued customer satisfaction and improvement, that's a great sign. If not, you may want to get their insight with this question.

16 We have a new employee starting, what does that process look like for your team? What should we expect and what would you expect from us?

This is most definitely a "check box" question. Any lack of a defined onboarding and offboarding process will absolutely cause you and your team problems in the long run. The simple question here is: do they have a process in place or not?

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