

MSP Evaluation Checklist

Questions to ask every provider before you sign

Use this checklist to bypass sales rhetoric and uncover how each candidate MSP really functions.

1 Service scope and accountability

- ☐ What exactly will your team own, and what isn't included? Can we see an example itemized service plan or SOW?
- ☐ Do you provide virtual CIO consulting to help us align our IT budget with our business goals?
- ☐ Please describe your processes for Microsoft 365 administration and how you can help us use it more effectively.

2 Support coverage, response, and escalation

- ☐ How do you measure first response, escalation, and resolution? Can we see an anonymized example SLA?
- ☐ How do you determine when an issue requires an on-site engineer, and is that dispatch included in our flat rate?
- ☐ Who owns the communication and escalation process with third-party software vendors?

3 Team depth and continuity

- ☐ Are your support technicians in-house, or do you outsource to a third party?
- ☐ What engineers do you have on staff dedicated to cloud infrastructure and network architecture?
- ☐ Who else is familiar with our environment if our primary contact becomes unavailable?

4 Cybersecurity and the MSP's own security

- ☐ Do you have dedicated security personnel on staff holding relevant industry certifications, or is security handled by the general help desk?
- ☐ What mandatory security controls, such as MFA, do you require of your team before they can access our network?
- ☐ If your company suffers a cyberattack, what is your disclosure and containment protocol for your clients?

5 Backup, disaster recovery, and continuity

- ☐ How frequently do you conduct full server restoration tests to prove our data is recoverable? Can we see recent example restore-test evidence?
- ☐ In the event of a server crash, who is responsible for rebuilding it?
- ☐ Describe your strategies for protecting our data and operations from a ransomware attack.

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6 Onboarding and documentation

- ☐ What specific milestones define your onboarding process? Do you schedule technical discovery, credential handoffs, and staff training?
- ☐ Can we see your sample onboarding SOW and/or questionnaire documents?
- ☐ What is your procedure for securely onboarding and offboarding employees?

7 Pricing, exclusions, and contract terms

- ☐ Is your fee structure based on a per-user, per-device, or per-site model?
- ☐ Please state any minimums for billing or contract term length and any requirements for automatic renewal.
- ☐ If we choose to terminate this partnership, what documented transition assistance will you provide to our next IT team?

8 Reporting and ongoing accountability

- ☐ How will we know six months from now whether you are performing well? What reporting will we receive? Can we see an anonymized example?
- ☐ Can you give an example of how you identify the root cause of a recurring network issue rather than just resetting the device?
- ☐ Describe your protocols for our hardware and other asset life cycle management.

9 Industry and operational fit

- ☐ What experience do you have in our industry? Can you provide examples of digital tools and workflows for businesses similar to ours?
- ☐ What proactive measures do you take to ensure our systems comply with the specific regulatory frameworks required by our industry?
- ☐ Can you provide a client case study and reference from our industry?

10 References and proof

- ☐ When speaking to your references, how will they answer when I ask what happens during a major IT crisis?
- ☐ How will they describe what you do proactively beyond just resolving help desk tickets?
- ☐ What industry awards or accreditations for service quality has your MSP received?