

# Comprehensive Checklist for

## Evaluating Managed Service Providers Checklist



The checklist will help you make an informed decision about the right MSP for your needs. Follow the steps below to complete the evaluation:

**Step 1:**

**Review the Checklist:** Take a few moments to familiarize yourself with the checklist. It consists of a series of criteria related to MSP services and capabilities. Each criterion is accompanied by a brief description to help you understand what is being evaluated.

**Step 2:**

**Start Evaluation:** For each criterion, you will find a corresponding box labeled “Yes” and “No.”

- If the MSP meets the criterion, mark the box next to “Yes.”
- If the MSP does not meet the criterion, mark the box next to “No.”

**Step 3:**

**Calculate Your Score:** At the end of the checklist, there will be a section to calculate your overall score. This score will help you compare different MSP options.

- Each “Yes” answer is worth one point.
- Each “No” answer is worth zero points.

**Step 4:**

**Calculate the Total Score:** Count the number of “Yes” answers you selected and write down that number.

**Step 5:**

**Interpret Your Score:** Use the following scale to interpret your total score on your yes/no questions” at the end of this sentence.

- **0 to 5 points:** The MSP may not fully meet your requirements.
- **6 to 10 points:** The MSP meets most of your requirements.
- **11 to 16 points:** The MSP is a strong candidate that aligns well with your needs.

Let's get Started



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## Understanding Your Needs:

What specific IT functions does my business need help with?

How do the size and scope of my business impact its IT needs?

What industry-specific compliance regulations does my business need to adhere to?



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## Examining Service-Level Agreements:

Does the MSP clearly define its SLAs and termination clauses?

YES  NO

Does the MSP's SLA align with my business needs and expectations?

YES  NO

What does the MSP's contract cover, and what is its duration?

Does the MSP have insurance, and what does it cover?

## Checking Credentials and Expertise:

How many years has the MSP been in operation?

Does the MSP have experience working with businesses of similar size and industry?

YES  NO

Can the MSP provide testimonials or references from previous clients?

YES  NO

Can the MSP scale to fit my business growth?

YES  NO

Does the MSP hold any technical certifications or have partnerships with technology vendors (ex: Microsoft, AWS, Cisco)?

YES  NO

Does the MSP hold any established technology vendor partnerships?

YES  NO

## Evaluating Support and Monitoring Capabilities:

Does the MSP offer 24/7 365 support?

YES  NO

Will the MSP provide a dedicated support manager for my business?

YES  NO

Does the MSP have a proactive support approach?

YES  NO

What is the MSP's response time for IT issues and their guaranteed uptime?



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## Assessing Security and Disaster Recovery Measures:

Does the MSP offer security awareness training for employees?

YES  NO

Does the MSP have a formal, documented cybersecurity plan?

YES  NO

Does the MSP offer penetration testing as part of their services?

YES  NO

Does the MSP adhere to industry standards (e.g., ISO 27001) and compliance requirements (e.g., GDPR, HIPAA)?

YES  NO

Does the MSP have a Disaster Recovery Plan in place?

YES  NO

What physical and network security protocols and systems does the MSP have in place?

How frequently does the MSP apply system updates and patches?

What is the MSP's average recovery time in the event of an outage?

## Reviewing Transition and Cloud Migration Support:

Does the MSP offer cloud migration or transition services?

YES  NO

Can the MSP migrate necessary data or systems for my business?

YES  NO

Enter Your  
Calculated Score

Next Steps



## Next Steps: Making an Informed Decision with the MSP Evaluation Checklist

You've taken a significant step toward finding the right Managed Service Provider (MSP) for your needs. Now that you have your evaluation results, here are the next steps to consider:

### 1. Review Your Evaluation:

Take a moment to review your checklist and the answers you provided. Look at both the "Yes" and "No" responses to understand where the MSP excels and where there might be gaps.

### 2. Consider Priorities:

Reflect on the criteria that matters most to your organization. Are there specific areas where the MSP absolutely must excel, or are there some criteria that are nice-to-have but not critical? Use this insight to weigh the importance of each criterion in your decision-making process.

### 3. Additional Research:

Based on the checklist results, you may want to dive deeper into specific areas. If there were any "No" responses, consider asking the MSP for more information on how they address those concerns. You can also seek out reviews, references, and case studies to gain a better understanding of their capabilities.

### 4. Communication with MSPs:

Engage in open and transparent communication with the MSPs you are considering. Share your checklist results and discuss areas where you seek further clarification. This dialogue can help you gauge their responsiveness and willingness to address your needs.

### 5. Evaluate Costs and Contracts:

While the checklist covers various aspects of MSP services, pricing and contract terms are also crucial. Ensure you understand the costs involved, including any hidden fees or potential scalability costs. Review contract terms to make sure they align with your organization's objectives.

### 6. Seek References:

Reach out to the MSPs and ask for references from their current or past clients. Speaking directly with those who have worked with the MSP can provide valuable insights into their performance, communication, and overall service quality.

### 7. Arrange Demos or Presentations:

Consider arranging demos or presentations with the shortlisted MSPs. This allows you to see their technology in action and get a sense of how they approach problem-solving and client interaction.

### 8. Decision Making:

Combine your checklist results, additional research, communication with MSPs, and any other relevant information to make an informed decision. Remember that your organization's specific needs and priorities should guide your choice.

### 9. Implementation Planning:

Once you've selected an MSP, work with them to create a detailed implementation plan. This plan should cover the transition process, timelines, responsibilities, and any potential challenges that might arise during the onboarding phase.

### 10. Continuous Evaluation:

After selecting an MSP, periodically revisit the checklist criteria to ensure that the partnership continues to meet your organization's evolving needs. Regular assessments can help you make adjustments or seek new opportunities as your business grows.

### Dataprise is Here to Help:

Thank you for using our MSP Evaluation Checklist. We're here to support you throughout your decision-making journey. Remember, the right MSP partnership can have a significant positive impact on your organization's success. Good luck!

