

# ASK THE RIGHT QUESTIONS:

Your Guide to Finding the Right Managed  
Services Provider for Your Business





# How to find the right MSP:

Managed Services Providers are an increasingly popular approach to IT.

Businesses are outsourcing some or all of their IT department to bridge the technical skills gap and save money. Following the start of the 2020 pandemic, businesses moved much of their workforces online out of necessity. However, when restrictions eased, many business leaders allowed for the flexibility of in-office and remote work. In this increasingly remote world, many businesses were not technologically prepared for the transition and turned to IT outsourcing as a cost-effective solution.

## Thirty-Eight Percent

**38%** of businesses used an MSP to manage over half of their IT needs in 2021, up from 25% in 2020.<sup>1</sup>

Even if your business has already successfully transitioned to hybrid or remote work, or even if your business operations are fully in person, a Managed IT

Services Provider can still help you optimize your IT environment. You might need a provider to assist your existing IT team, maybe your business is growing and needs a more formal IT strategy, or maybe you're finding it difficult to retain top IT talent internally. Whatever your technology needs, there is an MSP that is the right fit for you.

It's important to standardize your search process, ensuring each provider is measured against the same set of wants and needs.

This standardized search should include a list of questions to ask every provider about their processes, procedures, and level of involvement in your business. Unfortunately, while we can share some key elements to look for and some red flags you'll want to run from, [this guide cannot tell you exactly what to look for in a Managed Services Provider](#).

The process of finding the right MSP for your business requires you to look internally and evaluate your own business first. Decide what are your needs for a Managed Services Agreement: What is your budget? How long can you afford to wait for service when problems arise? Is on-site support a "must" or a "nice-to-have"? These are all things to consider when starting your search for an MSP.

[Once you know what you need, you're ready to evaluate a potential provider's answers to our 12 Essential Evaluation Questions](#) and ensure the MSP you choose is in alignment with your needs and the best fit to become your IT partner.

1. [Modor Intelligence](#), *Managed Services Market - Growth, Trends, Covid-19 Impact, And Forecasts (2023 - 2028)*, 2021.



# PEI's 12 Essential Evaluation Questions

ASK THE RIGHT QUESTIONS



# Considerations:

Your business probably sources technology from several different vendors, and you might have a mix of infrastructure types. Any provider you're evaluating should be able to work with both on-premises infrastructure as well as with public, private, and hybrid cloud environments. Even if your business operates completely on-premises due to regulatory requirements in your industry or the preferences of your IT manager, using an MSP provider with cloud capabilities gives your business flexibility if the cloud becomes feasible for your business—and vice versa if you're operating solely in the cloud and suddenly need on-premises infrastructure.

Choosing an MSP with a wide breadth of experience means you won't need to find a new provider each time your business grows and adds a new element to your environment. The same principle applies to technologies and vendors. As technology continues to advance, you don't want to be limited by the capabilities of your MSP.

## Key Takeaways:

**Keep yourself flexible** with an MSP that has knowledge of a wide breadth of technologies, even if all of them aren't currently relevant to your IT practices. Make sure your MSP has a process for keeping up with industry advancements, so you **don't get stuck in the past**. If your systems require especially advanced or specialized knowledge, make sure you **understand how much access you'll have to engineers with the necessary expertise**.

## QUESTION ONE:

**1**  
**Do you have experience with a vast breadth of technologies and infrastructure types?**



# Ensure specialized knowledge will be available to you:

Having an MSP with advanced or broad skills doesn't necessarily mean you'll have access to that expertise when you need it. The most skilled engineers at any MSP are likely to be the busiest individuals at the company.

Ask any potential MSP about the availability of engineers with certain skill sets—especially for critical or uncommon technologies.

They might boast about their senior-level engineer with years of SCCM or Microsoft Endpoint Manager expertise, but if they only have one engineer with that skillset who's constantly inundated with tasks, that individual might be too busy to get to your environment consistently or quickly in emergencies. **In this example, you're not really getting access to expertise you're paying for.**

Engineers at an MSP will always be busy, so don't fret too much if you hear this. It's also not time to run away if you hear they only have one engineer for a certain, highly-advanced technology.

This is an area where you need to evaluate your business needs. An enterprise may want the assurance of having dozens of engineers able to handle specific pieces of their environment, while a smaller company might want to save money by finding an organization with fewer engineering staff members to contribute to overhead.

Keep in mind it's not necessarily the number of engineers available at any given time that's important.

It's more important to understand how the company handles resource constraints when there are urgent threats or problems.

Make sure to ask your potential MSP about their standard operating procedure for addressing issues and **how quickly you'll be able to receive help in an emergency from an engineer with the specific skills corresponding to your environment.**

A well-managed MSP will have an established plan for ensuring emergencies are always handled efficiently by the most relevant engineer. Also investigate how much time knowledgeable engineers will be able to spend on your environment for proactive measures. This will help you get a feel for how well your more advanced systems will be handled.

# Considerations:

The larger an MSP, the more likely they outsource part or all their engineering talent. Outsourced talent can be just as valuable as internal resources and help cut costs. However, this model may not work for everyone, especially businesses that prefer on-site support or smaller businesses without internal IT resources who can't afford long wait times to speak to a tech.

Before you sign a contract, make sure you know what you'll be getting and decide whether their outsourcing practice meets your needs.

## Personalize this Question for Your Business:

Does your business operate in international time zones? If so, you might need to rely on an MSP with a formal outsourcing strategy that touches many different time zones.

What do wait times look like? Does the MSP's outsourcing strategy help them better commit to the wait times your specific business case requires?

What support experience do you want for your users? Does this align with using outsourced talent?

**Do you  
outsource your  
engineering  
talent?**

2

## QUESTION TWO:

# Considerations:

It's essential that your MSP has a firm grasp of modern security practices and adapts quickly as threats evolve. Small or mid-size businesses may think they're small fish for hackers compared the massive amounts of data stored by enterprise organizations, but this is an unfortunately common misconception. **67% of SMBs experienced a cyberattack in 2018**,<sup>1</sup> with the average cost to remediate a breach at \$383,365. To make it worse, these numbers are increasing dramatically since the start of the pandemic.

A security breach can mean the end of your business, so your MSP must understand the importance of security and be able to demonstrate how they'll prevent themselves from introducing any vulnerabilities to your environment.

## Ensure Those Security Promises Aren't Empty:

Ask a potential MSP to perform a security assessment for you. If they can't perform this type of evaluation and deliver polished documentation, it's likely they don't have an established system for ensuring your environment will be kept safe and secure. If they're unwilling to evaluate your environment in any way before you sign on the dotted line, run the other way; they're probably more interested in a paycheck than the health of your business or success of your partnership.

## QUESTION THREE:

3

**Do you have  
advanced  
security  
knowledge?**

1. Ponemon Institute, *State of Cybersecurity in Small and Medium Size Businesses*, 2018.



# Verify the MSP's security practices satisfy insurance:

Cybersecurity insurance is growing significantly more popular for businesses of all sizes—and for good reason. The frequency and severity of attacks is rising.

## Forty-Eight Percent

**48%** of businesses surveyed by Dell in 2022 reported experiencing a cyberattack in the past 12 months.<sup>1</sup>

Make sure your business meets the requirements for your cybersecurity insurance policy, or your claim may be denied.

That's exactly what happened to International Control Services (ICS), an electronics manufacturing services company, after claiming to be using multi-factor authentication (MFA) and suffering a ransomware attack in May 2022.

Travelers Insurance, the issuer of the cybersecurity policy, took ICS to court to void the policy after an investigation into the attack revealed the claims made by ICS in regard to their MFA usage were incorrect.<sup>2</sup>

It's essential your MSP's security practice aligns with any needs outlined by your policy.

If your policy requires you to implement a prompt patching schedule or use MFA on your accounts, make sure to discuss these items with any potential MSPs:

- Does the MSP guarantee implementation of zero-day exploit patches in 24 hours when your policy requires implementation in 12 hours?
- Does the MSP disable MFA to allow multiple techs to access the same account in your environment while your policy requires MFA on all accounts without exception?

A high-quality MSP can drastically reduce your risk of a security event, but it's not the same as having no risk—and any promises to that end should be met with significant suspicion. Even with the best protection, you should always have a contingency plan, and for many businesses, this comes in the form of cybersecurity insurance—**where the burden for ensuring compliance ultimately lies with you.**

Working with an MSP who isn't sensitive to policy compliance can mean the difference between an accepted or denied claim—or the difference between keeping your business running or closing your doors.

1. Dell, *Dell Global Data Protection Index*, 2022.

2. *Insurance Journal*, *Travelers Wants Out of Contract with Insured that Allegedly Misrepresented...*, 2022.



# Considerations:

Not all Managed Services Providers can help you perform major upgrades or implement new technologies, but choosing an MSP who also has a division that can perform complex IT projects for your business can make operations more efficient when pieces of your current environment reach end of support or new options become available that fit your business model.

MSPs who also offer project engineering services understand the business technology landscape more thoroughly than MSPs who are only able to perform basic management and administrative tasks. An MSP that sees your relationship as a true partnership will also be intimately familiar with not only the technical specs of your environment, but your business goals as well. This type of MSP will be strategically positioned to help you make the best decisions for your environment.

## Take Inventory of Your Environment:

If you know some of your equipment is reaching end of support, or if there is a piece of your environment that isn't working for you, talk to any potential MSPs about the work they've done for other clients in this situation. Test their knowledge of new technologies and solutions.

**Can you help with  
new technology  
implementations  
or upgrades?**

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QUESTION FOUR:

# Considerations:

Your business doesn't just exist inside your offices—it exists wherever employees access your data. With the increasing popularity of working in remote locations, an effective MSP must be able to deliver their services to devices wherever they're located.

Most IT support functions can be delivered remotely. This delivery method is more efficient in terms of cost and time and allows you to choose your provider from anywhere—opening the candidate pool to potentially more skilled and advanced companies than are available in your locale. Remote delivery also positions your company for growth and expansion. If you open a new office across the state or country, you'll be confident your MSP can follow you there.

## Weigh the Specific Needs of Your Business:

If your management is uncomfortable working with your MSP remotely, it would be better to pursue an organization located near your business. If your organization exists in multiple countries, you might prefer a large MSP with offices located all over the world. MSPs exist in many different sizes and are able to deliver their services in a variety of ways—finding one that will work with your preferences is important to ensuring success.

**Do you deliver remote and/or onsite support?**

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QUESTION FIVE:



# Considerations:

In the modern business landscape, it's not feasible for your business to only be available during the traditional 9–5 work hours. Even if your employees go home at 5pm each night, your customers still need access to your website or online portals, emails sent from employee mobile devices still need to be delivered, and established security measures still need to be functioning.

Your MSP must be able to handle emergencies whenever they happen to get you back on track.

## Find the Right Balance for Your Business:

While more availability after hours may seem like the best possible option, it can also mean a more expensive contract. It's up to you to weigh the specific needs of your business.

Do you want your MSP to be available 24/7 with no extra charges? Or, do you want to save some money upfront on an MSP with more limited availability that offers the option to pay a one-time fee when you have after-hours emergencies? Most importantly think about your users, if they're located in many different time zones and you want them to have access to the MSP's helpdesk, make sure the MSP's availability lines up.

## QUESTION SIX:

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**Are your services  
available  
24/7/365?**

# Considerations:

Service-Level Agreements (SLAs) set expectations for wait times and service levels. If your potential provider doesn't have well-documented SLAs, it's a clear sign that they don't have established protocols—meaning your support tickets might fall to the wayside, and they won't be consistent in their delivery.

SLAs vary widely between providers. Make sure you know what qualifies for each priority level, so you're not left thinking your most important systems are covered under the highest priority level when they really fall farther down the list.

Also ensure their guaranteed response times for top-priority issues fit your needs. If your business can't wait two hours for a response without seriously affecting your bottom line for certain issues, make sure your MSP has an SLA shorter than two hours. If you can get by without some systems, it may be in your best interests to find a less expensive provider with SLAs that are just a bit longer.

## Find the Right Balance for Your Business:

Just like with round-the-clock availability, faster doesn't always mean better—but it usually does mean more expensive. It's not always about having the "fastest" MSP but striking a balance that fits your needs.

# 7 What are your Service-Level Agreements (SLAs)?

## QUESTION SEVEN:



# Considerations:

Although it's unreasonable to expect your provider to prevent problems 100% of the time, **a quality MSP should emphasize proactivity—preventing problems and driving continuous improvement.** With a proactive approach, critical threats are identified before they affect your business. This prevents you from experiencing downtime or interruptions, and a proactive MSP also provides much more value by continually working on your systems instead of waiting for an S.O.S. alert before taking any action.

Ask about automation and analytics practices. Automation can take care of some alerting, workload categorization and prioritization, incident escalation, and remediation tasks to address problems with your systems much more efficiently than procedures that rely on a person to first notice and then address the problem. Additionally, collecting and analyzing service delivery data can be a sign the MSP takes proactivity seriously and aims to provide the most efficient experience possible.

## Follow-up Questions:

Do you have automated systems that reduce the need for human intervention?  
Are you using analytics to improve processes over time and deliver more reliable services?  
What proactive maintenance tasks do you routinely perform for customers?

**Are your  
services focused  
on proactivity?**

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QUESTION EIGHT:

# Considerations:

Many MSPs tout their services as a “set it and forget it” engagement, and while good managed services do prevent you from spending time worrying about technology, you should have access to detailed reports about what your MSP has been doing on the back end to keep it that way. **You should never wonder what you're paying for.**

The best providers are willing to be completely transparent about their services—even if it means admitting you're not using many of the features you're currently paying for. This can come in the form of monthly reports or an online portal. Whichever format you receive this information in, make sure you're receiving both historical problem and resolution information as well as the actions taken on your environment to proactively prevent issues.

## Follow-up Questions:

- How often will you check in about plan usage and important metrics in my environment?
- What reports will I have access to, and how do I access them?
- Are these reports filled with jargon or industry-specific terms I won't be able to understand on my own?
- What do you typically recommend for customers when these reports show low usage of certain plan features?

**Will I have access  
to performance  
and usage  
metrics?**

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## QUESTION NINE:



# Don't underestimate user satisfaction:

An often-forgotten and underprioritized MSP performance metric is user satisfaction. Your employees are one of the greatest assets for your business, so while you might be the MSP's main contact, it's important to keep them in mind too. A primary function of your MSP will be to support users in their roles.

If this experience is negative, it can drag your business down by contributing to dissatisfaction and fostering inefficiencies that affect your bottom line.

## Thirty Percent

**30%** of workers dissatisfied with their work technology plan to leave their employer in the coming year.<sup>1</sup>

## Twenty-Three Percent

**23%** higher profit found for businesses units with engaged workers compared to units with miserable workers.<sup>2</sup>

Your MSP should make it a point to give your users a voice by having systems in place to collect this feedback and including this data in regular plan performance reviews.

If this isn't a metric the MSP you're evaluating provides for customers consistently, then you'll want to probe for more information about how concerned the MSP is with ensuring—and maintaining—a good user experience. You'll also need to strategize how to get a feel for this metric on your own internally.

These are some red flags to look out for as your relationship develops:

- The MSP complains your team members are taking up too much time.
- The MSP speaks negatively to you about your users to get you “on their side” about a user they're frustrated with.
- The MSP puts the burden on you to deal with employees who open repetitive or very frequent tickets—double red flag if they call them “problem users”—instead of working with you to craft systems that provide extra support to users who need it.
- The MSP doesn't quickly follow up on negative feedback directly with any negatively affected users to make it right.

**Pro Tip:** Even if your MSP will collect and provide user feedback, check in periodically on your own to catch any negative sentiment users may be feeling but are too embarrassed to submit through the MSP's system.

1. [Salesforce and Forbes Insights, \*The Experience Equation\*, 2020](#)  
2. [Gallup, \*State of the Global Workplace\*, 2022.](#)

# Considerations:

Some problems will require manufacturer or vendor intervention. A good relationship between these third parties and your provider means the MSP can escalate tickets on your behalf to get answers faster than you would be able to on your own. This inside access also means they have visibility into product evolution to help you make strategic decisions for your environment and maybe even snag a discount or two.

Ask about partner credentials. Do they have high-ranking partnerships with important vendors like Microsoft, Cisco, etc.? If a potential MSP doesn't have any of these partnerships or has only very low-level credentials, they won't be able to expedite processes or manage the relationship between you and your vendors.

## Quantity and Quality:

Also note the number of vendors your potential MSP works with. If they're heavily invested in a single vendor while completely ignoring all other industry players, it's likely this MSP will try to steer you towards their chosen vendor when it comes to making strategic decisions. Your MSP should instead help you find solutions that work best for your business—regardless of their established partnerships.

**Do you have  
strong vendor  
relationships?  
More than one?**

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QUESTION TEN:

# Considerations:

You don't want your MSP to be guessing when it comes to meeting the specific needs of a business in your industry. Ask potential providers if they've worked with any businesses like yours in the past. Better yet, ask if they're willing to provide you with relevant references.

## Make the Most of These Interactions:

Make the most of these interactions by avoiding simple questions that can be answered with generalities like, "Oh, I love them!" or "They're so great!" After all, the MSP has likely selected reference options from customers sure to sing its praises. Instead, ask probing and detailed questions that require the respondent to speak about concrete examples and think critically about the impact of the services. Start with these examples:

- ✓ Which part of your plan are you happiest with? Did anything surprise you (good or bad)?
- ✓ Do you have a specific example of how their services have saved you time?
- ✓ How often has this MSP met their SLAs on your account?
- ✓ What was the onboarding and transition process like?
- ✓ What is this MSP's communication like? How frequent?
- ✓ How have they approached dealing with a complaint or negative feedback from you or your users?
- ✓ What is a specific example of something you wish they did better or more consistently?
- ✓ How have they made it right after making a mistake?

**Do you have  
experience with  
others in my  
industry?**

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QUESTION ELEVEN:



# Considerations:

This question is especially important for businesses looking to hire an MSP in place of internal IT resources, though every company should make sure their MSP views them as a partner and not simply a paycheck. A strategic partner will be willing to weigh in on your technology decisions—from hiring new personnel to evaluating new technologies—even when they're not strictly related to your managed service plan.

Look for businesses offering Virtual CIO (vCIO) services. These include participating in important meetings, offering strategic insights, and helping you make the best decisions. Most importantly, this doesn't mean your MSP makes the decisions *for you* or that your MSP keeps all knowledge about your environment to themselves and leaves you in the dark. Instead, a great vCIO will help you understand what's happening in your organization so you can work together to better your business.

## Be Wary of Greedy Providers:

Take note of the questions any potential MSP asks about your business. Do they focus only on the money they can make from you? Or, do they ask questions about your business goals and technology objectives? Are they trying to learn more about you personally and build a relationship? This is a good sign they're looking to form a partnership with more than just your wallet.

**How involved  
are you willing  
to be in my  
business?**

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QUESTION TWELVE:

# Ask the Right Questions:

1

**Do you have experience with many technologies and infrastructure types?**

2

**Do you outsource your engineering talent?**

3

**Do you have advanced security knowledge?**

4

**Can you help with new technology implementations or upgrades?**

5

**Do you deliver remote and/or onsite support?**

6

**Are your services available 24/7, 365 days a year?**

7

**What are your Service-Level Agreements (SLAs)?**

8

**Are your services focused on proactivity?**

9

**Will I have access to performance and usage metrics?**

10

**Do you have strong vendor relationships? More than one?**

11

**Do you have experience with other organizations in my industry?**

12

**How involved are you willing to be in my business?**

# Where to Go from Here:

Ready to dive in? There's no such thing as a one-size-fits-all checklist when it comes to choosing this type of provider.

Before asking any MSP these questions, **make sure you know what's most important to prioritize for your unique business requirements and needs.** Don't be afraid to discard questions that aren't relevant or add new questions that speak to who you are.

An MSP can be an integral part of your success or a symptom of stalled business progress, so it's important to approach this decision as prepared as possible.

## Need Help? We're in Your Corner!

You might have noticed that throughout this guide, we've never referred to this process as finding the "best" MSP out there. Instead, we made it a point to say you're looking for the "right" MSP for you.

The truth is that just like there's no one-size-fits-all checklist, there's no one-size-fits-all MSP—though many MSPs might try to tell you differently (hint: this

is actually a big red flag!). Providers who claim to be a perfect fit for everyone are more concerned about the contract money they'll get when you sign and less concerned with the success of your business.

So, we won't claim to be the best MSP for everyone, but we may be a good fit for your business. **We'll partner with you to help you understand if that's the case. If not, we'll help you determine what to look for in another provider.**

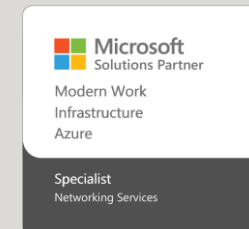
## Get Started with PEI

Schedule a no-obligation discussion with our experts today for help organizing your search or to ask us any question on this list!

PEI has over 30 years of experience partnering with small and midsize businesses, helping them use technology to meet their business goals and solve their business problems. We have been rated a top 100 MSP in the US by Cloudfango two years in a row.

## Get Started with PEI:

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If you need help starting the MSP search or learning more about the many strategies for modern IT management, [contact PEI today!](#)

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