

Smart IT Leader’s MSP Evaluation Checklist

Choose, Manage, and Hold Your MSP Accountable

1. Is It Time for an MSP?

- ☐ Recurring skill gaps in cybersecurity, cloud, or compliance.
- ☐ IT projects delayed by firefighting or lack of bandwidth.
- ☐ Infrastructure too complex for current staff.
- ☐ No 24/7 monitoring or disaster recovery plan is untested.
- ☐ C-suite expects innovation and “no downtime” (but budget is flat).
- ☐ Merging, scaling, or running distributed teams.
- ☐ Facing increased audit, regulatory, or compliance scrutiny.

Tip: If you check 2 or more, MSPs should be on your radar.

2. MSP Discovery & Selection: Deep-Dive Questions

Area	Questions to Ask	What to Look/Listen For
Strategic Fit & Proactivity	<div><div>• How do you learn our business model and industry?</div><div>• Last risk you flagged for a client—what did you do?</div></div>	<div><div>• Tailored insights, peer references, offers alignment workshops</div><div>• Stories of spotting threats before they escalated</div></div>
Technical Depth & Staffing	<div><div>• Who will be our core team? Meet them?</div><div>• Staff-to-client ratio? How’s coverage handled when staff change?</div></div>	<div><div>• Meet the actual engineers, not just sales</div><div>• Low turnover, clear backup plan</div></div>
Service Delivery	<div><div>• Show a sample monthly report (KPIs, root cause, business impact)</div><div>• How are issues triaged and escalated?</div></div>	<div><div>• Root cause & trend analysis, not just volume</div><div>• Business impact considered in priorities</div></div>
Security & Compliance	<div><div>• What frameworks (NIST, ISO, CIS)? Can we audit you?</div><div>• PAM? How is privileged access managed?</div><div>• Compliance experience? Will you sign a BAA (if needed)?</div></div>	<div><div>• Pen test/SOC2 available, sector compliance</div><div>• Enforces least privilege; no shared accounts</div><div>• Proactive compliance support</div></div>
Monitoring & Incident Response	<div><div>• MTTD/MTTR for recent real-world incidents?</div><div>• Who triggers IR? Automated or manual?</div><div>• How do you test disaster recovery?</div></div>	<div><div>• Clear, fast detection & response times</div><div>• Automated containment, tested DR plans</div></div>
Communication & Transparency	<div><div>• How do you report outages, security alerts, planned maintenance?</div><div>• How do you communicate bad news or failures?</div></div>	<div><div>• Multi-channel, business-friendly summaries</div><div>• Honest, root-cause focused, formal lessons learned</div></div>
Flexibility & Contracts	<div><div>• Can services be scaled or swapped mid-contract?</div><div>• What’s the offboarding/data handover process?</div></div>	<div><div>• Modular services, easy scaling</div><div>• Written, step-by-step exit plan</div></div>
Innovation & Value Add	<div><div>• How do you keep us ahead (not just “current”)?</div><div>• What improvements have you delivered to clients this year?</div></div>	<div><div>• Proactive recommendations, AI/automation pilots</div><div>• Peer benchmarking, continuous improvement</div></div>

3. MSP Performance Scorecard

Area	1 (Fail)	2	3	4	5 (Excellent)	Notes/Examples
SLA/Resolution Performance						
Proactive Risk Management						
Security & Compliance						
Reporting & Transparency						
Technical Competency						
Communication/Responsiveness						
Staff Stability						
Innovation/Value Add						
User Satisfaction						
Cultural Fit						

Scores 3 or below? – Schedule a review, demand a plan, or consider alternatives.

4. Red Flags – Don’t Ignore These!

- MSP blames tools/process instead of owning issues

• No new ideas or process improvement

• Security/compliance “ownership” is vague

• Overworked staff or lack of familiarity with your environment

• Surprise outages, costs, or support gaps

• End-user complaints are rising

• One-size-fits-all approach for unique needs

5. Pro Tips & 2024 Trends

- Sustainability: Does the MSP have green IT credentials?

• AI/Automation: Using AI for ticket triage or predictive analytics?

• Zero Trust: Can they implement identity-first security?

• Cloud-Native: Do they optimize in hybrid/multi-cloud?

• Peer Networking: Will they introduce you to user groups, not just references?

6. Decision Summary

- ☐ Yes

– Why?

Explain why you trust this MSP
- ☐ Not Yet

– What must change?

What needs to improve?
- ☐ No

– Next steps:

Actions to take

Use this checklist to drive vendor interviews, QBRs, and periodic reviews. It’s your tool for better decisions, strategic partnerships, and fewer regrets.