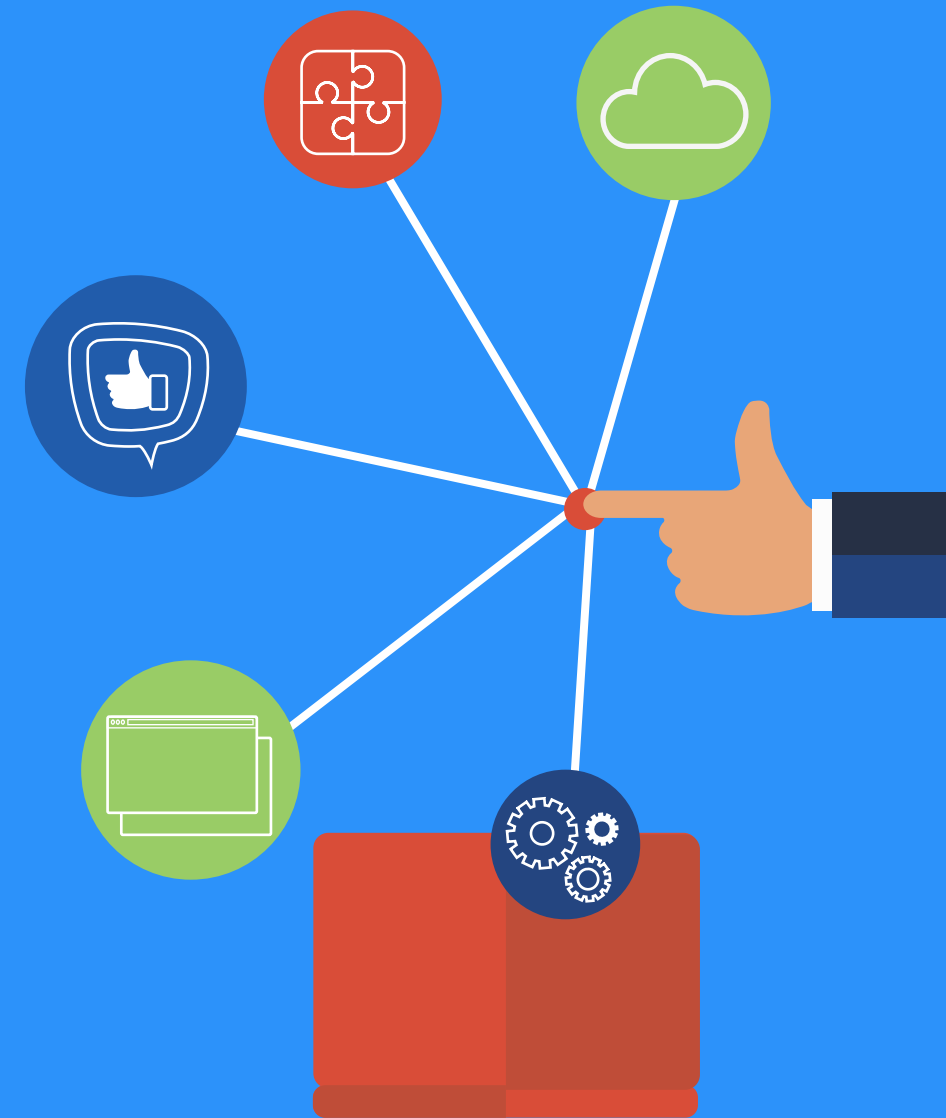


# 8 Ways to Evaluate a Potential MSP

What to look for and how you know when you've found the right one.



# Introduction

Technology advances are bringing new opportunities to businesses, but those advances can make managing technology in-house more difficult.

## **An MSP (Managed Service Provider) can help in two ways:**

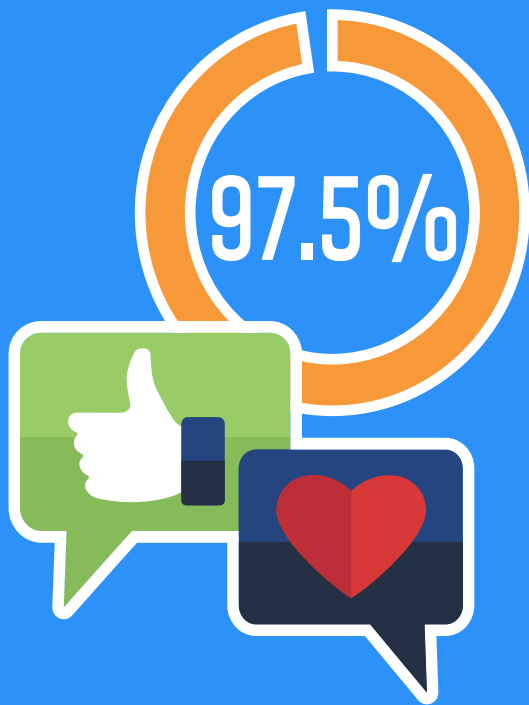
- Co-managing alongside your internal IT team to help get a project completed or by managing key functions.
- If you don't have internal IT staff, they can step in as a complete outsourced IT department.

***But how do I find an MSP that's the right fit for my business?***

(Glad you asked!)

**We put together this guide to help you evaluate your current – or a potential MSP – so you'll know when you've met the "right one"!**





**Quick Tip:** Don't hesitate to ask for **client referrals** - if they're confident in the support they provide, they'll be proud and eager to share them with you.

# 1 What do their customers have to say?

We have all come to rely on reviews and star ratings, so hearing what real customers are experiencing can tell you a lot about an MSP.

Take a look at their:

- 1 **Online Reviews**
- 2 **Social Media Sites**
- 3 **Testimonials**

Getting feedback from customers is a good way to see if their MSP holds themselves **accountable** and provides **predictable service**.

Do customers say they have a record of meeting their **Service Level Agreement** (SLA)? Nothing is more disappointing than unmet expectations, so make sure you and your MSP are on the same page.

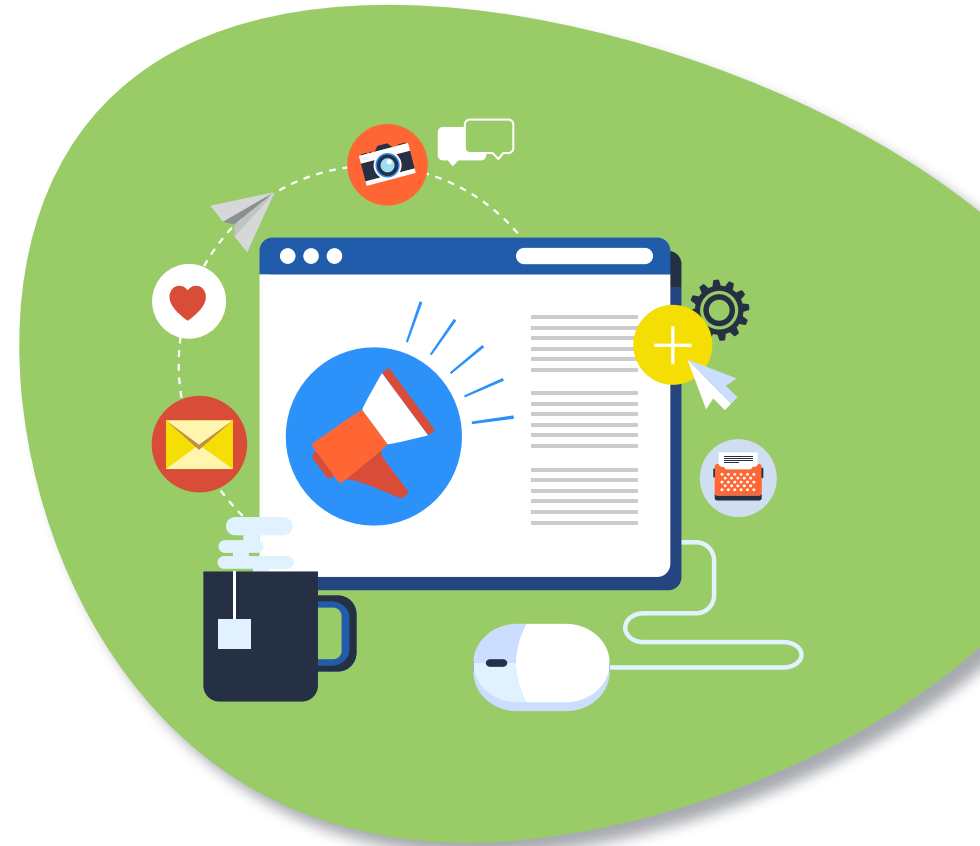
# 2

## What does their website tell you about them?

A website can tell a lot about a business, so naturally, it's a great place to start evaluating an IT service provider. Take a look at:

- 1 Service offerings
- 2 Years of experience
- 3 Recognitions
- 4 Awards

A company is only as good as its **reputation**, so what are you seeing? Do they share and highlight **case studies** and **customer stories**?



**Due diligence never hurts** – so check if they serve focused **industries** or **organization sizes**. It's essential to assess whether their service and support align with the needs and size of your business.

# 3

## What about their technical team?

If you're looking to fill a particular need, make sure the provider you're evaluating has the service expertise to help you. Do they have the **capacity** to help drive your success?

Ask how many **technical staff** they have and what **certifications** they hold. It can give you insight into the level and variety of skills within their team. Also, ask what their **turnover** rate is within their IT staff.

Knowing that you can consistently rely on their staff can help you build a long-lasting and trusted partnership with their team.

**Quick Tip:** One thing to look for in an MSP is IT helpdesk support that is North American-based and available outside normal business hours.



# 4

## What are their service capabilities?

When looking to find the right fit, you need options because

*IT isn't one-size-fits-all*

which means you'll need a plan that fits your business AND your budget. Does the IT provider offer both **co-managed** and fully **managed options**?

While custom plan options are a plus, it can be a lifesaver to have a one-stop-shop with an MSP that has everything you need, including **comprehensive offerings** for helpdesk, security, backup and recovery.



Trying a **helpdesk plan** is a great way to start an MSP relationship. It can free up internal IT resources, expand levels of expertise, save money, and keep employees happy! Look for a provider that offers 24/7, North American-based support and allows you to call Level 1 helpdesk directly when the need arises. You never know when you might need it!

Learn more  
[CCB Technology – Helpdesk options](#)



# 5 What is their communication style?



## Good communication is KEY

to any healthy working relationship, so **regardless of proximity** – your MSP partner should be able to communicate clearly and effectively.

Ask what their **preferred method** of communication is to see if it aligns with your needs.



## Know what to expect

When shopping around, it's okay to be thorough. Ask to understand how the MSP handles support tickets most effectively.

Find out about their ticket **response quality** by asking for client feedback surveys.



## Clarity and Accuracy

When it comes to IT, you may see dollar signs – and why shouldn't you? You work hard for your money and should know what you're paying for.

Make sure their scopes of work and **contracts are detailed** and their pricing and timelines are **accurate**.

Talk to us  
*Have any upcoming projects?*



# 6 Are they willing to be accountable?

You don't want to be changing providers regularly – it interferes with your business continuity. You need a relationship that will last, which means you're looking for a **responsible and accountable** partner.

A considerate provider will give **timely documentation** of their work and get **prior approval** for out-of-scope work. You don't need any surprises.

It's YOUR business and data they're protecting, so present your concerns, ask questions often and make sure they **respond without hesitation**.



### *Managed IT does NOT mean full access*

For peace of mind and trust, make sure an MSP only uses secondary credentials to access your network. Secondary credentials preserve your security and privacy and keep you in control.



# 7 Are their contractual agreements flexible?



So say it doesn't work out with a potential MSP and you aren't satisfied with their service – what are your options? You should be **able to part ways**. Are **month-to-month** contract options available?

### **Quick Tip:** Do they offer a Guarantee?

This can be a great way to “try before you buy” and says a lot about the character of the MSP and their willingness to stand behind their service.

Make sure the MSP you're looking into allows you to **add and remove** items and users as needed, and that the **price you're paying** reflects that.

If you're looking for **flexible support** and want help on an as-needed basis, see if they offer **per-project support** options as well.



Learn more  
[CCB's – You Can't Lose Guarantee](#)

## 8

## Do they align with you culturally?

You may not think so, but culture alignment is a huge factor in a compatible partnership. Do your research – look for their **mission statement** and **core values** on their website. Ask yourself:

*Do their values align with yours and does the MSP exemplify them?*

You want a focused partner driven by the same goals and values as you, especially because you're trusting them with your business.

*When you find the right fit, both sides will be happy.*



Find out what **philosophies** drive their success and how the partnership will help you **grow your business**. A key indicator is if they invest and take pride in their **people, tools, and processes**.



# Experience the CCB Difference

Finding the right MSP partner doesn't have to be a long process!  
In fact – **LOOK NO FURTHER!**

We're so sure that our level of IT managed services will exceed your expectations that we put it in a guarantee.

Join organizations across the country that know what it's like to have a great IT partner.

**Want to experience the CCB difference?**

Give CCB a try!

[See what we mean](#)

To see how CCB stacks up – use the checklist below.



**Print this checklist and practice on us at [ccbtechnology.com](http://ccbtechnology.com).**

### 1. Customers

- Check online reviews and testimonials – Do they have any? What do they say?
- Ask for client referrals – Are they willing to provide them?
- Do they have a record of meeting the requirements of their SLA? (Service Level Agreement)
- Review their social media sites – What are people saying?

### 2. Website

- What are their service offerings? Review their years of experience, recognitions, and awards.
- Do they highlight case studies or customer stories?
- Do they highlight customer testimonials within their focused industries?
- Do they specialize in certain sized organizations?

### 3. Technical Team and Certifications

- What is their service expertise as it relates to your needs?
- How many technical staff do they have and what are their certification levels?
- What's the turnover rate within their IT staff?
- Is their support U.S. based and available outside of normal business hours?

### 4. Service Capabilities

- What's included in full IT support and do they have co-managed options?
- Do they have comprehensive offerings for security, backup, and recovery?
- How do their helpdesk packages differ? Can you call Level 1 helpdesk directly?
- Can they provide on-site services when needed?

### 5. Communication

- What is the preferred method of communication is with their organization?
- How do they handle ticketing processes?
- How detailed are their scopes of work? Is their pricing and timeline accurate?
- What is their response quality? Check by asking for client feedback surveys.

### 6. Accountability

- Do they provide accessible and timely documentation of their work?
- Do they get prior approval for out-of-scope work, so there are no surprise costs?
- Do they use secondary credentials to access your networks?
- Do they respond to your questions or concerns without hesitation?

### 7. Flexibility

- If you aren't satisfied with their service, what are your options?
- Do they offer a monthly contract option?
- Can items and users be added or removed as needed?
- Can work be done on a per-project basis?

### 8. Culture

- What is their mission statement? What are their core values?
- Do their core values align with yours, and do they exemplify them?
- What philosophies drive their success?
- Is there pride in their people, tools, and processes?