QOS MSP Managed Services

CHOOSING AN IT PROVIDER:

THE MANAGED IT PROVIDER EVALUATION CHECKLIST

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Managed IT Provider Evaluation Checklist

The questions that separate a real IT partner from a ticket mill — use them on every provider you talk to, including us.

Hiring a managed IT provider is a multi-year commitment that most businesses make on a single number: the monthly price. The expensive differences — what happens during an outage, a breach, a billing dispute, or a breakup — only show up later, when switching is painful. This checklist puts those differences on the table *before* you sign.

How to use it: pick up to three providers and give each a column. For every item, mark ✓ only when the answer is **yes, in writing** — a verbal “of course” scores a blank. Tally each column on the scorecard at the end. Any provider that objects to filling this out has answered the most important question already.

1 — Security & Data Protection

The provider can show you, in writing, that…	A	B	C
Endpoint protection and patch management are included in the **base** price — not add-ons			
Backups are included **and restores are tested on a schedule**, with reports you can see			
Multi-factor authentication is enforced on **their own** access to your systems			
There is a documented process for locking out an employee the day they leave			
They have a written incident-response plan for a breach — theirs and yours			
They carry cyber-liability insurance and will provide the certificate			
They have real experience with the compliance rules you face (HIPAA, SOC 2, PCI DSS)			

2 — Support & Response

The provider can show you, in writing, that…	A	B	C
Response times are committed in a written SLA — by severity, with numbers			
Help desk is unlimited — not metered per ticket or per hour			
After-hours and emergency coverage exists, with its terms spelled out			
On-site support is available where your offices actually are			
A consistent team will know your environment — not a rotating queue			
You know who to escalate to when something stalls — by name			

3 — Billing & Contract

The provider can show you, in writing, that…	A	B	C
The monthly rate is flat, with a written list of what is **not** included			
Pricing is published or quoted without a sales meeting first			
"Per user" is defined — exactly which devices each user fee covers			
The bill adjusts the month your headcount changes — both directions			
The onboarding fee, and what it buys, is stated up front			
Price-increase terms are capped or require notice — not open-ended			

4 — Onboarding & Exit Terms

Nobody signs planning to leave — which is exactly why the exit terms tell you who you're dealing with:

The provider can show you, in writing, that…	A	B	C
Onboarding produces a documented inventory of your environment			
You own the documentation, admin credentials, and license accounts — not them			
Leaving has a defined cost — no auto-renewing multi-year lock-in with penalties			
Exit deliverables are listed: documentation, passwords, data, license transfers			
They commit to cooperating with a successor during transition			

5 — Proof & Track Record

The provider can show you, in writing, that…	A	B	C
References exist from businesses your size, ideally your industry			
The company has years in business you can verify — not a rebrand of last year's LLC			
You know who owns the company and whether you could actually reach them			
They will tell you what they're **not** good at — the honest ones answer fast			

Estimating the price side?

This checklist covers the *quality* half of the decision. For the *cost* half — counting users and devices and doing the math on any provider's rates — grab the companion **Managed IT Budget Worksheet** at **www.qosmsp.com**.

Instant Disqualifiers

Some answers end the conversation. Walk away from any provider where:

- Security or backups are **sold separately** from a “fully managed” plan — protection isn't optional equipment
- They keep **admin credentials in their name**, or resist putting your ownership of them in writing
- There is **no written list of exclusions** — if nothing is excluded on paper, everything is negotiable later
- The contract **auto-renews for multiple years** with a penalty exit buried in the fine print
- The price is **dramatically below market** — the missing money is usually your security or your response time
- They **won't fill out this checklist** — a partner who resists scrutiny before the sale won't improve after it

Scorecard

Count the checkmarks in each column (28 possible). Weight sections 1 and 4 heaviest — security failures and exit traps are the two mistakes you can't undo cheaply.

	Provider A	Provider B	Provider C
1 — Security & Data Protection (of 7)			
2 — Support & Response (of 6)			
3 — Billing & Contract (of 6)			
4 — Onboarding & Exit Terms (of 5)			
5 — Proof & Track Record (of 4)			
Total (of 28)			

A provider scoring under ~20 isn't necessarily dishonest — but every blank row is a term you'll be negotiating after you're locked in, instead of before.

Want our column filled out? Send us this checklist and we'll return it completed, in writing — every row. Schedule a free consultation at **www.qosmsp.com** or call **+1 (877) 800-7672**.