ROOK

ALWAYS ONE MOVE AHEAD

Working with a Managed Service Provider

Best practices to help you work smarter and avoid common pitfalls

WHAT TO LOOK FOR

At first glance, all Managed Service Providers (MSPs) may be the same. MSPs often offer the same suite of services and similar support methods and prices. These similarities can make it challenging to choose one from the rest.

What is it then that separates one MSP from another? Here are five key characteristics you should look for to find out which MSP is right for you:

PROFESSIONALISM

Take time to properly acquaint yourself with the people the MSP will be sending to your office. As an extension of your team, you should ensure that the MSP is courteous and capable of professionally representing your company. They will work with your vendors and your employees. They will also occasionally interact with your customers – appearance and personality matter.

COMPANY FIT AND CULTURE

Find an MSP that has a culture similar to your own. A company that values its employees will maintain a higher caliber of employee. Your staff will reap this benefit by being treated with understanding and empathy.

EXPERIENCE AND EXPERTISE

An MSP with years of experience is ideal for understanding your business and your needs. Expertise is essential to ensure you are moving in a direction that meshes with your business strategy. Choose a company that can handle technical problems and provides business strategy guidance related to technology decisions.

TECHNOLOGY DIVERSITY

Not all organizations have the same needs. You need an MSP that has team members with diverse skillsets. Look for a company that is willing to work in your environment rather than immediately push you towards products they are more comfortable supporting. A technologically diverse staff will enable the MSP to react to unexpected situations more quickly and effectively.

SERVICE OFFERINGS

You should look for an MSP that provides a wide range of services and solutions. This variety is a reflection of the technological diversity of their staff. A provider who is familiar with on-premise environments and cloud hosting can appropriately evaluate your situation and support you more effectively.

Services to look for are:
- Cloud Hosting
- Network Security
- Server Management
- Disaster Preparedness
- Application Development
- Project Management
- Industry Certification Preparation

AVOIDING PITFALLS

Many MSPs subscribe to the philosophy that making it painful for you to switch providers is the best way to retain you as a customer. Look out for MSPs who exhibit some of these habits – ask for references and take the time to ask about these items.

INFORMATION SHARING

Does the MSP hold any information from the company? Passwords? System credentials? Account access? What does the MSP say when you want full access to the hardware on your desk?

Ask who owns your domain name? Who controls your DNS entries? These may sound like foreign concepts, but they are vital to maintaining control over your business.

Make sure that your new MSP is going to share information with you. This implies a level of trust and partnership.

CHANGE RESISTANCE

Pick an MSP that is up to date on current trends. That doesn't mean that you have to keep up with everything everyone else is doing, but your MSP should be ready when you need to implement new technology. Businesses today need to move quickly to meet the demands of modern consumers.

RESPONSIVENESS

An MSP is there for you not just to fix problems when they come up, but to also be your technology partner. Giving you advice on technical decisions and solving complex issues so you can focus on critical business of your own.

Look for an MSP that has established response times and support hours that meet your needs. Not every business needs 24x7 support, but no company can afford to have their systems down for a week without a resolution is in place, either.

MAKING THE CHANGE

Once you have picked a new MSP, being prepared for the transition is essential.

It's important that your MSP can provide a seamless transition of support services to keep productivity from being hindered. Look for an MSP that begins with an audit to determine what information they need to collect. Ask about their project plan and the overall transition process.

Here are some tips that can help you make the transition:

FROM INTERNAL STAFF

When transitioning from an internal IT team to an MSP, there can often be communication challenges or potential feelings of "ill-will" that could result in a less than optimal transition. To avoid this, it is important that an MSP treat existing staff in a respectful and friendly manner. Respecting previous IT decisions and spending time to become familiar with the infrastructure is very important. Though changes could be necessary, there should not be any negative discussion regarding previous decisions. The focus should be on positivity and solutions that will be beneficial for the overall success of the company. Spend time to gauge your new MSP to determine their level of positivity and empathy.

FROM ANOTHER MSP

If taking over support from another MSP, it's important to communicate new procedures and processes clearly and early. Staff-wide notices should be sent out ahead of time. The MSP should take care to make introductions and meet the staff. Contact information should be dispersed, and the appropriate communication procedures should be established. Typical methods of doing this would be to send a

company-wide e-mail and then have representatives from the MSP visit and introduce themselves to staff members while providing contact cards.

The outgoing MSP should be informed, and the new MSP should request a copy of all pertinent data. Most companies will have a method or process for releasing this information, but the incoming MSP should ensure that they provide a detailed list of all accounts and passwords that they need to receive. This can ensure that documentation is not unintentionally omitted by the previous company.

FROM NO IT STAFF

Your new MSP is going to have many questions for you – these questions are intended to inform so that the provider can be successful in realizing the full potential of your environment. Look for an MSP that has an organized onboarding process and a well-tested project plan. Transitioning from self-service IT to having an expert taking care of issues can be challenging but is often more welcome than expected. Pick a partner that best fits your culture. The bonds and trust that your staff build with the MSP are crucial for the success of the relationship.

COMPLETING THE TRANSITION

A vital aspect of a smooth transition is preparedness. Choosing an MSP that is willing to put in the pre-work to familiarize themselves with your company, your team, and your work environment will go a long way in easing any discomfort. By making early introductions and clearly defining the support path, your staff will feel comfortable when they need to reach out to the new MSP. Establishing a personal relationship is critical and will be the basis for further developing a strong partnership with the company and its staff.

Once your transition is underway, you can get back to business with one less worry on your mind. An experienced MSP will make the transition a smooth and painless process.