

SOP: Troubleshooting Methodology

Purpose:

The purpose of this SOP is to provide guidelines for the MSP IT Support Team to effectively troubleshoot and resolve technical issues during support engagements. This SOP follows the CompTIA troubleshooting methodology to ensure a structured and efficient approach to problem-solving.

Scope:

This SOP applies to the MSP IT Support Team and all employees at the supported company. It covers the procedures for identifying, analyzing, and resolving technical issues encountered during support engagements.

Responsibilities:

Support Team: Responsible for executing the troubleshooting process, documenting findings and resolutions, and maintaining effective communication with clients.

Employees: Responsible for providing relevant information to the Support Team in a timely fashion, including issue descriptions, error messages, and any recent changes or events that may have preceded the problem.

Prerequisites:

The MSP and the supported Company have an existing communication plan between employees and the Support Team.

Procedure:

Identify the Problem:

- Gather information from the client regarding the reported issue, including specific error messages, symptoms, and any recent changes or events that may have preceded the problem.
- Ask open-ended questions to clarify the problem and gather additional details.

Establish a Theory of Probable Cause:

- Analyze the gathered information to formulate a theory about the probable cause of the problem.
- Utilize knowledge bases, technical documentation, and experience to identify potential causes.

Test the Theory to Determine the Cause:

- Develop a plan to test the identified theory of probable cause, considering the least disruptive approach to minimize impact on the client's systems and operations.
- Perform the necessary tests, observations, and experiments to validate or eliminate potential causes.
- Document the results of each test, including any relevant observations and findings.

Establish a Plan of Action to Resolve the Problem:

- Based on the test results, formulate a plan of action to address the root cause of the problem.
- Consider factors such as feasibility, impact on client systems, and resource availability when developing the plan.
- If necessary, seek input or approval from relevant stakeholders or higher-level support teams.

Implement the Solution:

- Execute the plan of action to resolve the problem, following established best practices and client-specific requirements.
- Communicate with the client throughout the resolution process, providing regular updates and seeking feedback.

Test the Solution:

- Validate the effectiveness of the implemented solution by performing tests and checks to ensure the problem has been resolved.
- Verify with the client that the issue has been resolved to their satisfaction.

Document the Findings and Resolution:

- Maintain accurate and detailed documentation of the troubleshooting process, including all steps taken, tests performed, solutions implemented, and their respective outcomes.
- Update internal knowledge bases, documentation repositories, or ticketing systems with relevant information for future reference.

References:

[CompTIA Troubleshooting Methodology](#)

Definitions:

- MSP - Managed Service Provider
- IT - Information Technology
- SOP - "what, when, why"; could be multiple SOPs to support a specific policy

Revision History:

5/16/2023 -- "SOP: Data Back-up and Restoration" created by Jon McMullin