

Managed Service Provider Vetting Checklist for Small Businesses



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MSP Vetting Checklist for Small Businesses

Initial Review

- ☐ Do they have positive online reviews and/or referrals?
- ☐ Do they have an online presence?
- ☐ Do they have a secure website?

Digital Interactions

- ☐ Do they use appropriate email subject lines?
- ☐ Do they spell your name and company name correctly?
- ☐ Do they provide the opportunity to unsubscribe, opt out, or change email preferences?
- ☐ Are their communications concise and easy to understand?
- ☐ Do they respect your time?
- ☐ Are they genuinely interested in your business strategies and concerns?
- ☐ Do they offer clear solutions to your problems?
- ☐ Are they transparent about their pricing?

Services

- ☐ What is the managed service provider's (MSP) scope of services?
- ☐ Does the MSP have experience with businesses in your industry, size & scope?
- ☐ Do they have tenure in the industry?
- ☐ Do offer co-managed it solutions (*if applicable*)?
- ☐ Do their solutions match your current & future goals?
- ☐ Are their servers located in the US?
- ☐ Are they willing to explain if they have lost any clients and why?

Security & Disaster Recovery

- ☐ Do they offer cybersecurity solutions?
- ☐ Do they offer simulated phishing training for your staff?
- ☐ Do they offer penetration testing?
- ☐ Do they have a formal cybersecurity plan?
- ☐ Do they offer real-time event/incident/issue monitoring & management?

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- ☐ Do they have internal security policies for employees?
- ☐ What does their system patching/updating process look like? Is it an automated process?
- ☐ What physical securities do they have in place?
- ☐ Do they have a tested disaster recovery plan in place?
- ☐ What network security protocols & systems are in place? Do they align with your company's requirements?

Frameworks, Certifications & Compliance *(if applicable)*

- ☐ Can they clearly explain what certifications they possess and the frameworks they align with?
- ☐ Are they knowledgeable in HIPPA HITECH?
- ☐ ...HIPPA HITRUST CSF?
- ☐ ...NIST 800-171?
- ☐ ...NIST 800.53?
- ☐ ...CMMC?
- ☐ ...DFARS?
- ☐ ...MITRE ATT&CK?
- ☐ ...Lockheed Martin Cyber Kill Chain?
- ☐ ...Centers for Internet Security CIS Controls?

Support & Monitoring

- ☐ Do they offer a proactive approach to maintenance?
- ☐ Are they deeply client focused?
- ☐ Will you receive a support manager for your account?
- ☐ Do they provide 24/7/365 remote management & monitoring?
- ☐ How many people do they have on their help desk team?
- ☐ What is their response time SLA?
- ☐ Do they have a guaranteed uptime? If so, what is it?
- ☐ Do they offer CIO-level guidance?

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- ☐ Do they offer cloud & mobile solutions?

Terms

- ☐ Do they provide a comprehensive service level agreement (SLA)?
- ☐ What does the contract cover?
- ☐ Does their contract length meet your needs?
- ☐ Do they have insurance?

Transitioning

- ☐ Can they thoroughly explain their onboarding process to you?
- ☐ How long will the onboarding process take?
- ☐ Are they able to migrate your data & systems?