Penn Tech Solutions

Your Local IT Partner for Small Businesses

PLANNING GUIDE

MSP Document Checklist

Essential Business Documents for Managed Service Providers

Greater Philadelphia Area
Montgomery, Bucks, Chester & Delaware Counties

info@penntechsolutions.com | (215) 555-1234

January 2026

Document Overview

This checklist outlines the essential documents needed to run a professional MSP business. Documents are organized by priority level to help you focus on what matters most when starting out.

Priority Levels

Critical	Need before signing first client
High	Need before active marketing
Medium	Create as you grow
Lower	Create as needed

Document Categories

Client-Facing	Documents clients will see or sign
Sales	Marketing and sales materials
Compliance	Security and regulatory documents
Operational	Internal processes and procedures

Summary

19	**4**	**5**	**6**
Total Documents	Critical Priority	High Priority	Medium Priority

Critical Create these first - you will need them immediately when signing clients

Created	Reviewed	Document	Category
☐	☐	**Master Services Agreement (MSA)** Main contract template covering terms, liability, payment terms, and legal protections	Client-Facing
☐	☐	**Service Level Agreement (SLA)** Defines response times, uptime guarantees, support hours, and escalation procedures	Client-Facing
☐	☐	**Proposal Template** Professional quotes with scope, pricing, timeline - used for every new opportunity	Sales
☐	☐	**Statement of Work (SOW)** Template for scoping individual projects with deliverables and acceptance criteria	Client-Facing

Notes

High Create these before actively marketing - essential for professional operations

Created	Reviewed	Document	Category
☐	☐	**Client Onboarding Packet** Welcome document with contacts, portal access, expectations, and getting started guide	Client-Facing
☐	☐	**Acceptable Use Policy** Defines what clients can and cannot do on systems you manage	Client-Facing
☐	☐	**Data Handling Policy** Documents how you protect, store, and handle client data	Compliance
☐	☐	**One-Page Service Sheets** Leave-behind flyers for each service - great for sales meetings	Sales
☐	☐	**Network Documentation Template** Standardized format for documenting client environments	Operational

Notes

Medium Create these as you grow - important for scaling and compliance

Created	Reviewed	Document	Category
☐	☐	**Incident Response Plan** Step-by-step procedures when a security event occurs	Compliance
☐	☐	**HIPAA Business Associate Agreement** Required if serving healthcare clients - legal compliance document	Compliance
☐	☐	**Risk Assessment Template** Standardized evaluation of client security posture	Compliance
☐	☐	**Case Studies** Success stories showing ROI and outcomes - powerful sales tool	Sales
☐	☐	**Comparison Sheet** Why choose you vs. DIY, break-fix, or larger MSPs	Sales
☐	☐	**Escalation Procedures** Internal document for handling complex issues and when to escalate	Operational

Notes

Lower Create these as needed - helpful but not urgent for starting out

Created	Reviewed	Document	Category
☐	☐	**ROI/Cost Savings Calculator** Shows value of managed services vs. downtime costs - sales tool	Sales
☐	☐	**Client Offboarding Checklist** Ensures clean handoff if a client leaves - protects both parties	Operational
☐	☐	**Disaster Recovery Plan Template** Template to create DR plans for clients	Operational
☐	☐	**Vendor Management Policy** How you evaluate and manage technology vendors	Operational

Notes

Complete Document List

All documents listed by priority. Use this page as a quick reference for tracking overall progress.

Critical Priority

- [ ] Master Services Agreement (MSA)
- [ ] Service Level Agreement (SLA)
- [ ] Proposal Template
- [ ] Statement of Work (SOW)

High Priority

- [ ] Client Onboarding Packet
- [ ] Acceptable Use Policy
- [ ] Data Handling Policy
- [ ] One-Page Service Sheets
- [ ] Network Documentation Template

Medium Priority

- [ ] Incident Response Plan
- [ ] HIPAA Business Associate Agreement
- [ ] Risk Assessment Template
- [ ] Case Studies
- [ ] Comparison Sheet
- [ ] Escalation Procedures

Lower Priority

- [ ] ROI/Cost Savings Calculator
- [ ] Client Offboarding Checklist
- [ ] Disaster Recovery Plan Template
- [ ] Vendor Management Policy

Document Creation Tips

Start with Templates

Don't reinvent the wheel. Look for MSP-specific templates from industry associations, vendors, or legal services. Customize them for your business.

Get Legal Review

For contracts (MSA, SLA, SOW), have an attorney review them before use. This protects you from liability and ensures enforceability.

Keep It Simple

Documents should be clear and understandable. Avoid jargon where possible. If clients can't understand an agreement, they won't trust it.

Version Control

Date your documents and track versions. When you update a template, archive the old version and note what changed.

Review Annually

Set a calendar reminder to review all documents yearly. Update for new services, changed processes, or legal requirements.

Helpful Resources

+ CompTIA - MSP resources and templates
+ ASCII Group - Peer groups and document sharing
+ ConnectWise / Datto - Vendor-provided templates
+ Local attorney specializing in technology contracts