



## Having the Expectation Setting Conversation with Your Clients



# Having the Expectation Setting Conversation With Your Clients



## Why Have This Conversation? Your Clients Are Happy, Right?

How many times have you heard a client say, “Our IT company takes care of all our technology needs.”? Does it make you uncomfortable? It should.

Clients too often make incorrect assumptions about the services their MSP is providing. Technology is a broad word that covers a lot of ground. What does “all” mean? Just ask 5 company leaders what technology means to them, and you’ll probably get 5 different answers. Unless technology is given a clear, plain English definition with boundaries everyone understands – and agrees to, expectations and services are misaligned.

The place to start is with a conversation with your clients. You don’t know what they’re thinking unless you ask.

Yes, it can feel uncomfortable, especially if you have been working with a client for a while. They have a preconceived notion about what you’re delivering. As long as their day-to-day business is running smoothly, their expectations are being met.

But what happens when an event outside the scope of your services occurs? To avoid that unpleasant moment, it’s time to align your services and your clients’ expectations.

Remember...clients don’t know what they don’t know.

---

*This material has been created exclusively for members of Quest Technology Group’s MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



Don't worry. We've provided you with questions that will help you lead a comfortable discussion. At the end of this conversation, you'll have a clearer understanding of your clients' definition of technology. With that in mind, you can identify where the gaps exist, how you will fill them, and how you can confidently expand your services to meet your clients' needs.

Let's get started.

## Part 1: Discover Your Client's Expectations for Your Valued IT Services

### 1. What are your primary goals for partnering with our MSP?

This question helps identify your client's expectations and whether they align with the services you're prepared and qualified to offer.

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



## 2. Will you list the services you believe we are providing for you?

Asking clients to describe in business-focused words their understanding of the services ensures any discrepancies can be addressed early on.

---

---

---

---

---

## 3. What specific areas of your operations do you believe are currently managed or supported by our team?

Their answer will help you pinpoint departments or aspects of the company you might be aware of. You will gain insights into their priorities and concerns without even asking.

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



## **4. Will you list the technology-related activities that are supported by one of or more of your employees?**

It's not unusual for some of the day-to-day support and decision-making to be handled by one or more employees. Who they are, their skillsets, their degree of influence, potential for conflicting solutions, all impact how effectively your team can deliver your services.

---

---

---

---

---

## **5. What specific technology-related activities are your company responsible for?**

Your clients have a responsibility to ensure the services you provide align with the policies and procedures they have implemented. From time to time, you might ask them to perform certain tasks or consider recommendations you have made. It's important that you know how your clients view their responsibilities.

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



## 6. Can you list the technology services that are provided by outside companies?

Most companies rely on third-party applications and services for their business. It's important to identify who these providers are, how their activities coincide with yours, and clarify who supports them.

---

---

---

---

---

## 7. How do you define success in our partnership?

Understanding the client's criteria for success allows you to tailor your services and communication to meet these expectations.

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



## **8. Will you walk me through how a typical technical support or assistance request from our company flows?**

Hearing your client's description of the process reveals how well they understand the complexity as well as their appreciation for effective processes. It's an opportunity for you to shine a spotlight on your responsiveness and attention to detail.

---

---

---

---

---

## **9. What is your understanding of our response time for issues and inquiries?**

Clarifying expectations around response times can prevent frustration and miscommunication.

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



## **10. What are your expectations regarding the frequency and depth of communication or reporting you receive from our team?**

Every client is different in how much they want to feel in control. Sharing information with them is one way to give them the level of involvement they need.

---

---

---

---

---

## **11. How do you prefer to communicate and receive updates about your services?**

Understanding the client's preferred communication methods ensures that updates and information are delivered in a manner that is most effective and useful to them. This small, personalized detail reminds your client that you're listening to them.

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*



# Having the Expectation Setting Conversation With Your Clients



---

---

---

## **12. How do you envision our respective roles and responsibilities when it comes to tasks like software updates, security patching, or system maintenance?**

This comes back to shared responsibility with in-house folks as well as other third-party providers. Being very clear on these tasks helps avoid gaps in essential services as well as potentially harmful duplications. We recommend completing the matrix (included) of every service that you currently provide and using this in a subsequent what-you-do discussion.

---

---

---

---

---

## **13. If you were to experience a significant technology-related issue or outage, what would you expect our company's response and resolution process to look like?**

Slow down and carefully explore this. Use examples to explain what "issue" means to that client. This question is critical to guide you in setting proper expectations.

.....

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



---

---

---

---

---

**14. Beyond day-to-day operations, what level of strategic guidance or consultative support do you expect our company to provide regarding your technology roadmap or future initiatives?**

Uncover how open the company leader is to develop a strategic business-focused approach to technology. This is where you can expand your services to include long-term planning and CIO level expertise.

---

---

---

---

---

**15. How do you perceive our role in your overall IT strategy?**

.....

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



This helps gauge whether the client views the MSP as a strategic partner or simply a vendor, influencing the level of engagement and service required. It's another way of asking the preceding questions.

---

---

---

---

---

## **16. Are there any services or support you need that you believe we are not currently providing?**

This question can uncover unmet needs or services your client incorrectly assumes are included, allowing for adjustments in service agreements.

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



**17. Are there any specific compliance requirements, industry regulations, or data protection standards that you believe our team is responsible for ensuring your adherence to?**

These are critical requirements to clearly define and include or exclude in your service agreement.

---

---

---

---

---

**18. How would you describe the level of technical expertise or certifications you expect our team members to possess?**

This will reveal your client's awareness of technical expertise, what they value, and where you can develop partnerships.

---

---

---

---

.....

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



---

## **19. If you could change or enhance any aspect of the services we provide, what would that be and why?**

This is a valuable question to wrap up the first part of this conversation. What better way to uncover opportunities and growth possibilities for your company than by listening to your clients.

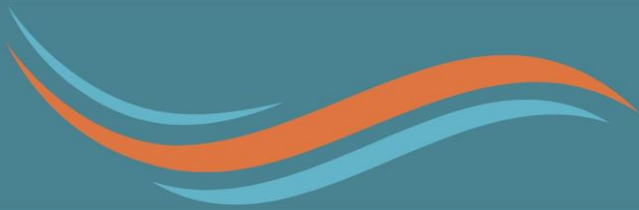
---

---

---

---

---



## Part 2: Cybersecurity, The Misunderstood Service

Cybersecurity is often assumed to be included in MSPs' services. MSPs don't always have the skills and expertise to deliver these services. There is a significant difference between delivering day-to-day support services and possessing proactive cybersecurity expertise. Setting the proper

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



expectations and then delivering cybersecurity with the right skills is critical. Installing a couple of monitoring agents is not adequate cybersecurity protection.

When MSPs engage with clients about cybersecurity, it's essential to gauge the client's awareness and commitment to cyber risk management.

These questions aim to deepen your understanding of your client's current cybersecurity posture, their level of knowledge, and their commitment to implementing and maintaining robust cybersecurity measures. This discussion can help align your services with your client's specific needs and expectations, ensuring a more effective and collaborative approach to managing cybersecurity risks.

## **1. What is your current understanding of cybersecurity in relation to your business?**

This question helps assess the client's basic awareness and perceptions of cybersecurity, setting the stage for a more in-depth discussion. The next questions will help you explore this in more detail.

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



## **2. How do you define cybersecurity, and why do you believe it's important for your business?**

This question encourages the client to reveal their perception of cybersecurity, revealing their depth of understanding and the value they place on it within their business context.

---

---

---

---

---

## **3. How would you rate your organization's overall cybersecurity preparedness on a scale of 1 to 10?**

Why did they choose that rating?

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



**4. What specific cybersecurity threats are you most concerned about for your business?**

This reveals their overall awareness and commitment to cybersecurity. It will pinpoint areas needing immediate attention and risks you should be aware of.

---

---

---

---

---

**5. How do you currently monitor and respond to potential cybersecurity threats or suspicious activities within your company?**

This question provides insight into the client's proactive measures and their effectiveness in addressing cybersecurity risks.

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*



# Having the Expectation Setting Conversation With Your Clients



**6. How do you assess and manage the cybersecurity risks associated with third-party vendors or partners?**

Third-party risk management is a critical component of a comprehensive cybersecurity strategy, revealing your client's approach to external threats.

---

---

---

---

---

**7. What steps have you taken to secure your remote work environments, especially with the rise of work from anywhere? Do you have employees or contractors who work from home, at remote jobsites, other locations, in the office?**

The shift to remote work has introduced new cybersecurity challenges; understanding the client's response can highlight their adaptability and commitment to security.

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



---

---

---

**8. In the event of a cybersecurity incident, what are your immediate priorities?**

Describe an incident that your client can relate to. It might be a perceived threat, malware detection on a desktop, or ransom payment demand. This question helps gauge the client's preparedness for incident response and their understanding of critical actions post-incident.

---

---

---

---

---

**9. How do you currently monitor your systems and networks for potential security threats?**

Inquiry into your client's monitoring capabilities and practices can reveal gaps in their cybersecurity defenses that you should address.

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



---

---

---

---

**10. Can you describe your company's current cybersecurity policies, procedures, and controls? How often are these reviewed and updated?**

Regular updates and reviews are essential for maintaining an effective cybersecurity posture; this question assesses your client's commitment to continuous improvement.

---

---

---

---

---

**11. What cybersecurity training or awareness programs do you have in place for your employees? How frequently is this training provided?**

Employee awareness and understanding are key to enforcing policies and mitigating insider threats, highlighting the client's approach to internal security culture.

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



---

---

---

---

---

## **12. How do you plan to evolve your cybersecurity measures to address emerging threats and technologies?**

This question assesses the client's forward-looking perspective on cybersecurity, including their openness to adopting new technologies and strategies for enhanced protection.

---

---

---

---

---

## **13. Does your company have cyberinsurance?**

.....

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



If so, who is the carrier? What are the limits? What is their expectation of their insurance paying in the event of an attack?

---

---

---

---

---

## **14. Have you previously experienced any cybersecurity incidents, and how were they handled?**

Understanding past incidents provides insights into potential vulnerabilities and your client's readiness to respond to future threats.

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



## **15. What do you consider to be your most critical digital assets, and how are they currently protected? Where are they stored?**

Identifying what the client values most in their digital environment helps prioritize security measures.

---

---

---

---

---

## **16. How do you currently manage user access and permissions within your systems?**

This question sheds light on the client's approach to access control, a fundamental aspect of cybersecurity.

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



## **17. What are your current practices regarding the use of employee-owned devices for business?**

Employee-owned devices need to be managed consistently to ensure company data and valuable assets are protected.

---

---

---

---

---

## **18. How are these devices monitored and maintained to ensure they're up to date and meet your company security requirements?**

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



**19. Have you conducted any cybersecurity risk assessments or penetration testing exercises to identify potential vulnerabilities in your systems or networks?**

---

---

---

---

---

**20. What is your current policy on regular software updates and patch management?**

Regular updates are crucial for security; understanding the client's practices in this area indicates their commitment to maintaining secure systems.

---

---

---

---

---

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*



# Having the Expectation Setting Conversation With Your Clients



**21. Do you have an incident response plan in place to guide your company's actions in the event of a cybersecurity breach or attack? If so, when was it last reviewed and tested?**

An incident response plan is critical for effective management of cybersecurity incidents. Knowing whether the client has and tests such a plan reveals their level of preparedness.

---

---

---

---

---

**22. What measures have you implemented to protect sensitive data, such as customer information, financial records, or intellectual property, from unauthorized access or data breaches?**

---

---

---

---

---

.....

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



## **23. What are your expectations from us as your MSP in terms of cybersecurity?**

Clarifying the client's expectations ensures the MSP can align their services accordingly or address any misconceptions.

---

---

---

---

---

## **24. How do you educate your employees about cybersecurity, and how often is training provided?**

Since human error is a significant factor in security breaches, understanding the client's approach to cybersecurity education is crucial.

---

---

---

---

---

.....

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



**25. Are you compliant with specific industry regulations concerning cybersecurity, and how do you maintain compliance?**

Compliance requirements can significantly influence a business's cybersecurity strategies; knowing these allows the MSP to tailor their services effectively.

---

---

---

---

---

**26. What is your budget or planned investment for cybersecurity measures?**

---

---

---

---

---

.....

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



## **27. How does your organization prioritize and allocate resources (budget, personnel, and tools) for cybersecurity initiatives or improvements?**

Discussing the budget upfront helps gauge your client's commitment to investing in cybersecurity and aligns expectations regarding the scope of your and all cybersecurity partners' services.

---

---

---

---

---

## **28. If a significant cybersecurity incident were to occur, what are your expectations regarding our company's role and responsibilities in addressing and mitigating the issue?**

---

---

---

---

---

.....

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



## What's Next?

### Action Items

1. Invite your team to a review session.
  - a. Set the tone as positive with new opportunities for everyone.
  - b. Share the information you've collected from your client with the team.
  - c. Encourage them to listen to what the client is saying without becoming defensive or dismissive. These are your clients, and they have businesses to run. Technology is a tool that supports their business. The business does not support technology. That's an important distinction to continually remind everyone.
2. Identify the gaps in your client's current services.
  - a. Be objective. It's tempting to weigh the relative importance of each service based on what you currently provide.
  - b. You're committed to delivering the right services and direction for your clients. That means putting their needs first.
3. What services and skills does your company lack that your client needs?
  - a. Be objective. You don't want to put your client at risk because you are uncomfortable being truthful.

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*

# Having the Expectation Setting Conversation With Your Clients



- b. Although clients expect more from their IT providers than is realistic, technology folks sometimes contribute to these inflated expectations.
  - c. Be open to partnering. We'll cover more of that in another section. For now, know that building complementary relationships is how providers and their clients will succeed in the future.
- 4. Use these gaps as an opportunity to provide additional services for your clients. When confidently and clearly explained to your clients, they will appreciate your insights.
- 5. Become comfortable speaking in business-focused words. Replace technical jargon with business context that your clients can relate to.
- 6. Practice business-first conversations with business leaders you know. Explain your goals and ask them to give you honest feedback.

---

*This material has been created exclusively for members of Quest Technology Group's MSP Community. No portion of this content may be reproduced, redistributed, or shared online or offline in any form without the prior written consent of Quest Technology Group LLC.*