Building a Technology Partnership to Last

The MSP Getting to Know You Meeting

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For Your Toolkit

Technology Partnership Organizer.xlsx

The information we're recommending you gather prior to the meeting will help you clearly share your company's specific needs and why.

If you've sneaked a peek at what follows, you may be tempted to say "No way". That's why we've created this worksheet to help you organize the information we'll discuss here. You'll be surprised at how easy this is --- and how useful taking a big picture moment can be.

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Purpose

The getting-to-know-you meeting has one purpose: to determine if you and the MSP will work together. There are a lot of factors that go into a mutually-successful relationship, and we'll explore them in this chapter.

The MSP needs to first understand your business, your clients, your culture and your strategic plans.

If you have come far enough to consider an MSP relationship, then you have some specific thoughts about how you need the MSP to work within your organization. As you approach this first meeting, come with an open mind. You may discover hidden opportunities that had not been considered.

You need to determine how the MSP views the potential relationship. Is it 'what can we sell you next?" or "how can we help you be successful for the long term?".

Actions

Organizer Tab: About Your Company

We all know our business so well that describing it clearly and concisely to an outsider can be harder than we think. It is important that your prospective MSP have a clear understanding of your company before you move ahead.

☐ 1. Prior to the meeting practice your company introduction message. Keep it short.

As you continue your discussion, these points should all become part of the exchange.

☐ 2. What is that vision that drives everything you deliver every day?

☐ 3. What does this prospective business partner need to know about your products and services? For example, is your industry highly regulated? Are there specific privacy policies that must be supported?

☐ 4. Who are your clients? You don't have to divulge specific names. What you want to share is the client persona(s).

☐ 5. What do your clients expect from you? This should include response times that rely on technology, portal access, etc.

☐ 6. How do you interact with your clients? Do your clients have online access? Email? Text? Phone? Online communities? Social media?

☐ 7. What are the day-to-day activities that drive your company?

☐ 8. What are your plans for the coming year? The next 3 years? At this point in the relationship, you don't need to share proprietary company plans. Your goal is to simply shape a picture of your company's future direction.

The MSP has now learned about your company and is ready to gather more detailed information. These details will help the MSP determine if he is staffed to fully meet

your needs.

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Organizer Tab: Operations

☐ 1. What do you believe is currently working well for you?

☐ 2. What are you OK with even if it's not ideal?

☐ 3. If you could change anything right now, what would it be? Don't worry about time, money, employees, clients --- this is just a perfect world picture.

☐ 4. What current problems would you like addressed? What would be improved as a result?

☐ 5. Are there peak days and/or times that need to be supported?

☐ 6. How many locations do you have?

☐ 7. Where do your employees work?

  o   In the office?

  o   Established home office?

  o   Mobile anywhere?

      o   Combination of these?

- [ ] 8. Who in your company currently supports your IT needs?

    o   What specific things do they do?

    o   What other non-IT duties do they have?

    o   Do they enjoy the IT assignment?

- [ ] 9. What outside resources support your IT needs?

- [ ] 10. Do you provide equipment for remote workers? If so, what?

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Organizer Tab: Technology

- [ ] 1. What software applications are critical to your company? Why?

- [ ] 2. What equipment is critical? Why?

- [ ] 3. What hardware is located in-house?

- [ ] 4. What software is currently installed in-house?

- [ ] 5. Do you use mobile applications for your business?

If yes :

☐   5a.   Are they native, mobile web or hybrid?

       Native apps are ones downloaded from Apple or Google.

       Mobile web apps are not installed on the mobile device. The are accessed from the mobile browser or home screen icon just like any website.

       Hybrid apps are a combination of downloaded apps and web applications.

☐   5b.   Are they proprietary applications?

☐   5c.   Are they accessed on phones, tablets, both?

☐   5d.   Who supports the apps?

☐   6.   If no, do you plan to add mobile in the future?

☐   7.   What cloud services are you using?

☐   8.   Where is your email hosted? Do you use Exchange?

☐   9.   Do any employees have remote access to in-house or hosted PCs or servers?

☐   10.   Do any clients have remote access to in-house or hosted PCs or servers?

☐ 11. Do you maintain a hardware and software inventory?

☐ 12. Do you replace equipment on a regular schedule?

☐ 13. Do you upgrade software as new versions are released?

☐ 14. How do you manage passwords? Do you record them in a secure online repository?

☐ 15. Do you have an IT security policy?

  ☐ 15a. If yes, who manages it?

  ☐ 15b. Who has access to it?

  ☐ 15c. How often is it reviewed and updated?

☐ 16. If no, would you like to implement one at some time in the future? Why or why not?

☐ 17. Where are your domains registered?

☐ 18. Do you have admin and technical access to all domains?

☐ 19. Where are your websites hosted?

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Organizer Tab: Comfort Level

☐   1. Have you outsourced your IT support in the past?

   ☐ 1a. If yes, what was your experience?

   ☐ 1b. If no, why not?

☐   2.   Are you interested in moving any in-house technology to the cloud? Why or why not?

☐   3. What support do you feel is best done in-house?

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Organizer Tab: About the MSP

It's your time to learn about the MSP's company too. While you won't dig too deeply into all of the services details yet, you do want to have a clear understanding of the depth and expertise the MSP brings to your company.

Don't hesitate to ask specific questions about the level of expertise the MSP has on

staff. We all know how quickly technology is changing. You need a service provider that has the ability to hire and adapt quickly to their clients' changing needs. A commitment to an educated team is critical. This has to be at every level of the organization.

☐ 1. How many technicians do you have on staff full-time, part-time, contract as needed?

☐ 2. What certifications do your technicians have?   As much as demonstrating specific technical and industry expertise, current certifications indicate a commitment to maintaining skills and relevance. These certifications can include but aren't limited to:

- o Microsoft Server xxxx where xxxx is the version such as 2003, 2005, 2008, 2012, 2016. You want a technician that is skilled in many versions.
- o Microsoft SQL Server xxxx. Same version requirements as above.
- o Microsoft IIS xxxx.
- o MCSE Cloud, Business Intelligence, Data Platform, Private Cloud
- o MCSA SQL Server
- o CompTIA A+, Server+, Cloud+, Network+, Linux+
- o Cisco CCP, CCNE, CCNP, CISM, CISSP, GSEC
- o Dell

- o AWS

- o VMware

- o Vendor-specific certifications for products and services the MSP recommends.

☐ 3. What organizations are you and your team involved in?

☐ 4. What are the most informative conferences you have attended in the last 12 months?

☐ 5. What are the three most influential books you have read or listened to this year?

☐ 6. Will we have a dedicated point of contact? Most MSPs will tell you they have an account manager. Our experience has been this person is really a speed bump in the communication process. Don't get too hung up on this position. You want someone who can execute as needed.

☐ 7. How many full-time project managers do you have on staff? How many years of experience?

☐ 8. How many full-time program managers do you have on staff? How many years of experience?

☐ 9. What is your response time for support issues?

☐ 10. How are issues reported, assigned and monitored?

☐ 11. How will we easily access our support history anytime?

☐ 12. What documentation will you provide for

- o Overall IT infrastructure. This should be the result of the network discovery.

- o Passwords assigned. This is especially important as users and devices are added to the network.

- o IP addresses to all devices. This should be documented during the discovery.

- o Hardware inventory.

    - ▪ Hardware manufacturer, serial numbers, assigned to, location, purchase date, warranty. Some of this will be documented during discovery. Purchase date and warranty of existing hardware should be added to the inventory from your records. New purchases should be added either by you or the MP depending on who acquired the item.

    - ▪ Who owns the equipment? If the MSP installs it on your network, he may own it. For example, a backup device the MSP uses will most

likely be removed when you end the agreement.

- o Software inventory.
    - ▪ Vendor, license keys, number of users, purchase date, version, warranty, support, renewal date.
    - ▪ Who owns the license? If the MSP has installed the software on your devices, then he most likely owns it. If you end your relationship, then the MSP will remove this from your devices.

☐ 13. How will you keep us informed about changes in third-party vendor policies and support? This is important for end of life support for software.

☐ 14. How will you monitor our network performance to proactively respond to issues?

Thumbs Up

☐ The MSP first asks questions about your business not "how many PCs and servers

do you have?"

☐ As you describe your company, the MSP takes notes.

☐ The discussion is a two-way exchange of questions and answers. Does the MSP ask relevant questions that show he is listening and interested?

☐ The MSP encourages employee growth through education.

☐ The MSP has a business-first mindset.

Thumbs Down

☐ The MSP immediately opens his packet of marketing materials for you to review.

☐ The meeting starts with "this is what we do".

☐ "I can save you money." It's too soon to talk about that.   A full discovery needs to be completed and reviewed with you before moving into sales mode.

☐ "We don't support that". Whatever "that" is, and it is a necessary part of your business. It's not unusual to find MSPs that support only Windows PCs, laptops and servers hardware and software updates. In the world of mobile, you need a provider that has the expertise to go beyond traditional thinking and support.

Expected Results

Both you and the MSP will have now developed an understanding of needs, interest, culture and compatibility. It's time to be totally honest.   If one or the other does not feel the fit is there for any reason, then this is the time to say so. Getting into a relationship that just doesn't feel right for whatever the reason will not go well.

If you are ready to move to the next step, then by all means make the commitment. In that case, let's move on to the next step.

Deliverables

A "go" or "no go" to the next step

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What's Next

The Discovery

A full network discovery should be done before an accurate service proposal can be prepared.

This discovery should be completed by an experienced network engineer. The purpose is to create a complete picture of your IT infrastructure. Support isn't a one size fits all service, and an experienced MSP will not commit to services without this.

It is typical for an MSP to charge a fee for this discovery. A thorough analysis takes time

to complete and is a valuable resource for both you and the MSP.   Often the cost of this discovery is waived if you commit to move ahead with the MSP.

Once completed and documented, you and your MSP will review it together.

Visit the Quest Technology Group Academy

Let's Connect Anytime

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