



# IT Service Provider

## Checklist For Choosing the Right Partner

If you want IT that supports your organization's success, you need an IT service provider who supports your needs. Whether you're reviewing your existing technology or looking for new solutions to extend your company's capabilities, choosing the right partner is critical. We've created this checklist to help you evaluate your options and find the right match.

## The Checklist

### 1. Make a site visit.

- Arrange to visit on a Monday morning—the busiest time of the week for most service providers.
- Are help-desk managers called away to deal with unexpected and/or urgent client issues?
- Does the firm seem to have adequate help-desk staff to handle the volume of calls?
- How many network monitoring alarms exist?
- How many network monitoring alarms are old, and how old are they?
- Can backup audit tickets be produced?
- Can tickets requiring authorization for a security change be produced?
- How many open tickets does each engineer have?

### 2. Ask about customer service processes and performance.

- What metrics are used to manage service timeliness and quality?
- Request copies of customer satisfaction data.
- Request copies of checklists used in customer onboarding.
- What are the provider's normal business hours and how do they handle support at other times?
- How did the provider help another company with issues similar to yours?
- How many employees work in service delivery as opposed to sales and marketing?

### 3. Ask about scope of managed service offerings.

- Is unlimited on-site, business hours and after hours support included?
- Is the labor to replace systems at end of life included?
- What management services, such as software renewals, are included?
- What CIO consulting and planning services are included?
- What security, compliance, and business continuity services are included?

### 4. Ask about business continuity, security, and privacy practices.

- Request copies of security and privacy policies.
- Request copies of third-party security audits and certifications.
- If your organization is subject to HIPAA, request a copy of the provider's Business Associate Agreement.
- Request an overview of the firm's disaster recovery and business continuity plans.
- What percentage of the service staff are contractors?
- If any of the following are outsourced, request a detailed description of the outsourcing arrangement.
  - Help desk services
  - Network monitoring
  - Server hosting
- Request a description of the provider's hiring and termination processes.
- Has the provider ever been responsible for a breach of client privacy/personal information? If so, request details of the breach as well as the steps taken to prevent a future breach.



The partner you choose will manage one of your greatest assets—your data. Take the time to vet prospective partners thoroughly.

## 5. Ask about your potential service team.

- Ask about the level of formal education and certifications held by team members.
- Ask about the partner status of the service provider with key technology vendors such as Microsoft.

## 6. Ask about company longevity and stability.

- How long has the provider been in business and how long has it been profitable?
- Request a summary of any lawsuits the provider has been involved in within the past five years.
- What was their employee turnover in the past year?
- Who is the average client (size, industry, type of engagement)? How many ongoing clients does the provider have? How long have those clients been with the provider on average?

## 7. Evaluate references.

- Request 5–10 references and contact three randomly chosen from the reference list.

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Your employees will depend on your IT partner for technology advancement and support. Assess prospective partners' hiring practices, staff retention record, and client base.

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