



CompTIA Channel Standard: Managed IT Solution Providers



The CompTIA Channel Standards were created to help improve the relevance, quality and consistency of service delivery within the IT industry. They establish specific performance requirements that will guide businesses through a continual improvement process, allowing them to embrace intelligent and highly effective business practices. Those who adopt these standards may realize their benefits in a number of ways: Increased customer confidence; heightened professional pride in the delivery of IT solutions; improved efficiency for the business in addition to the client, and an industry-wide dedication to establishing IT Solution Providers as integral to the strategic and tactical execution of their clients' business goals.

Compliance with a CompTIA Channel Standard is not an endorsement of any particular solution, but it will serve as an assurance that the delivery of those services complies with the covered practice.



Why Comply with these Standards?

CompTIA Standards expose IT businesses to the collective best practices of the IT industry, based on years of experience shared by scores of successful peers and industry professionals. IT companies should use these ideals to: guide process improvement; identify areas of strengths as well as differentiation; in addition to encouraging adoption of these intelligent business practices with their employees and peers. Embracing the Channel Standards not only elevates your company's performance, it elevates the entire profession by ensuring a consistently positive customer experience.

Implementing a Standard

CompTIA recommends following these steps to embrace and implement a high standard for operations within your business.

1. Become familiar with the Standard. Review and study the related documents. Take note of differences between the Standard and the company's current practices. Discuss conducting a self-assessment of business operations based on the Standard with the management team.
2. Compare the Standard to your reality. Consider the questions posed within each of the Standard's recommendations. Is there an opportunity for improvement? Is this something that could be an organizational strong point, a key differentiator, or offer a competitive advantage for your services?
3. Identify areas where changes or other actions could make meaningful improvements. Begin by selecting one or two areas to focus on. Realize that heavy lifting may be required to achieve meaningful enhancements, but be sure the required effort fits the return. Arbitrarily achieving a standard is not helpful when that achievement only creates additional work and headaches.
4. Monitor progress and manage change. New processes can be challenging for employees to embrace. Ensure they understand the purpose of the intended improvement and include them in the planning process so the end result meets their required needs.
5. Join CompTIA as a Premier Member. CompTIA boasts a large catalog of education programs, standards, certifications, research studies, networking opportunities and peer collaboration events; each designed to help you and your business become more successful.

CompTIA Channel Standard for Managed IT Solution Providers (v 1.0)

This Standard is designed to pair with the CompTIA Channel Standard for IT Solution Providers and details intelligent business practices fundamental to operate a Managed IT Solutions business, while providing quality services and value to their clients. Though this Standard represents the input of numerous experts over countless hours of experience and meeting with IT businesses to learn about them; the outcome will be dependent on execution and a number of market-specific as well as economic factors beyond the scope of this standard.

Only with honest self-reflection can a business effectively evaluate itself against this checklist. Throughout that process, the company and its management team can embrace incremental improvements; focus on establishing and meeting the ever-increasing expectations of their clients; in addition to creating a highly professional environment for employees.

The CompTIA Channel Standard for Managed IT Solution Providers provides intelligent business practices for the core operational, management, and delivery functions of a managed IT services firm. By pairing this Channel Standard with the CompTIA Channel Standard for IT Solution Providers, a full picture of functional best practices for your business is created. Those functions have been categorized as follows:

- Business Generation
- Delivery & Operations
- Customer Relations
- Business Management
- Business Direction



Category 1

Business Generation

In addition to the intelligent business practices defined within this Channel Standard, please refer to the *CompTIA Channel Standard for IT Solution Providers* (and complementary workbook) for more information on these **Business Generation** topics:

- **Proposal** – Provide the client with a clear understanding of the proposal.
- **Contract** – Ensure there is an agreed scope of work to meet the objectives specified.
- **Marketing** – Clients are aware of how the business can meet their needs.
- **Sales** – Close business with specific clients to achieve the goals of the business plan.
- **Requirements Gathering and Specification** – Quality requirements are defined and met.
- **Customer Analysis** – Develop a clear understanding of the needs of the customer.

Technical Skills, Experience and Certifications – The client trusts that you and your staff have the necessary skills as well as the experience required to deploy and support the technologies and solutions provided.

Be able to demonstrate experience as well as skills in the technologies deployed and supported through documentation of certification in addition to job history. Combining both vendor-neutral and -specific training and certification with targeted recruitment of qualified technical staff can create a robust work force able to support the solutions.

Customer Analysis – Align support levels with the business strategy of the client.

Hold discussions with the client to determine their current and intended use of technology to meet their business goals. Understand the business needs as well as budgetary constraints. This is related to the “Customer Analysis” best practice defined in the *CompTIA Channel Standard for IT Solution Providers*.

Site Analysis – Undertake technical and security surveys of the existing IT environment to gain a thorough understanding prior to recommending a solution.

Utilize assessment tools to conduct an audit, or “health check”, of the infrastructure and security in place prior to drafting a Service Level Agreement. This allows an accurate inventory and SLA to be created with improvements for technical and risk management as identified and recommended at the outset.

Standardization – Standardize equipment to deliver benefits of economy of scale and consistency.

Work with the client over time to promote standardization of their infrastructure. Benefits of standardization include: cost, consistent performance, improved recovery time, reduced training, maintenance and repair cost.

Category 2

Delivery & Operations

In addition to the intelligent business practices defined within this Channel Standard, please refer to the *CompTIA Channel Standard for IT Solution Providers* (and complementary workbook) for more information on these **Delivery & Operations** topics:

- **Resource Management** – Work does not exceed the capacity of the business.
- **Risk Monitoring** – Acceptable levels of risk are defined and kept within agreed limits.
- **Quality** – Internal quality requirements are defined and met.
- **Site Documentation** – There is clear and understandable documentation for the IT solution.
- **Control Non-Conforming IT Solutions** – Components that do not work are not deployed.
- **Auditability** – There is evidence of the correct work being carried out.
- **Acceptance Procedure** – Procedure exists to validate acceptance of the solution.
- **Business Case** – Documented steps to develop a business case for a proposed solution.
- **Management of Change** – Assist the client in making sure the solution is successfully adopted.
- **System and Data Migration** – Manage the process of migrating existing systems and data.
- **Systems Integration** – Manage a systems integration process.
- **Documentation** – The client has the correct documentation for their software solution.
- **Project Management** – Ensure that the project is delivered accurately, on time, and within budget.
- **Understand Competencies** – Records are kept of staff development needs.
- **Integrity** – Assure that IT solutions are delivered without interference.
- **Delivery Across the Business** – Ensure that the client gets what they expect.
- **Timely Payments** – To manage cash flow and suppliers' expectations.
- **Sub-Contractor SLAs** – SLAs show that internal quality requirements are defined and met.
- **Manufacturer Relationships** – Make use of the opportunities with manufacturers and suppliers.
- **Training** – Offer training to your client to ensure they can use the solution effectively.

Benchmarking – have a methodology for optimization and improvement of client infrastructure.

The client should be made aware of how well their infrastructure is performing, the level of support offered, and any risks. By benchmarking areas such as those below, you can place clients in a structured program of optimization and improvement.

- Identity and Access management
- Desktop performance
- Device and server management
- Security and networking
- Data protection and recovery
- IT and security processes



Incident Management – Have a protocol in place to manage support incidents effectively.

The client should be able to contact a named manager directly and within the method of their choosing (phone, email, web chat, portal, etc.). Processes and staff resources need to be in place to ensure the incident is recorded, and when possible, resolved at the first contact. Systematically record and track all incidents, additionally allowing for client's access/view of the system.

Preventative Maintenance – Demonstrate proactive activities to ensure the client's infrastructure is consistently reliable.

Ensure your standard SLA includes proactive and preventative monitoring maintenance options at regular intervals that suit the client's needs. Utilize remote and automated fault diagnosis and correction where appropriate. Ask clients about issues that have occurred. Identify trends and take mitigating action. Plan necessary outages to minimize impact.

Reporting – Provide the client with useful management information.

Include management reporting as a service within the SLA. The management report should: summarize proactive, reactive, and on-request tasks undertaken; any issues detected; and any remedial tasks performed. Availability, performance, capacity, and upgrade/replacement planning information should also be provided. Any future risks should be identified when possible and improvements recommended.

Technology Obsolescence – Protect clients from technology obsolescence.

Continually research and test new products that relate to the infrastructures you support. Work closely with your technology partners and keep ahead of the game by attending relevant exhibitions and trade shows. Monitor client hardware and software asset lifecycles so that upgrades/replacement can be planned in conjunction with performance assessments.

Promote Environmentally Aware IT – Support you and your client's environmental policies.

Utilize remote monitoring and management of client networks. Recommend power saving measures to clients. Older, less-efficient hardware should be retired as part of a proactive lifecycle management process.

Support 3rd Party Arrangements – Assure clients that 3rd party hardware and software receive the same level of support and protection as 1st party.

Take out your own support/care package with the hardware and software manufacturers whose products you provide to clients. Monitor or manage your client care packs, subscriptions, and renewals so they can plan their budgets and remain up-to-date.

Use Appropriate Tools and Systems – Implement the right automation tools and systems to achieve the business goals of managed IT services and solutions.

Network Operating Center (NOC), Remote Monitoring and Managing System (RMM), Professional Services Automation System (PSA), Asset Change/Configuration Management Database (CMDB), Software Licensing Compliance Management System, and Ticketing System are all essential to delivering remotely managed IT services. Utilize these tools and systems to meet your business goals.

Category 3

Customer Relations

In addition to the intelligent business practices defined within this Channel Standard, please refer to the *CompTIA Channel Standard for IT Solution Providers* (and complementary workbook) for more information on these **Customer Relations** topics:

- **Defined Service Level Agreements** – SLAs to the client are defined, documented, and actioned.
- **Customer Satisfaction** – Form evidence from spontaneous and solicited feedback.
- **Help Desk** – The responses to problems raised are within the constraints of SLAs.
- **Account Management** – Build good relationships by delivering a strategic IT service.
- **Support and Maintenance** – Have a protocol in place to manage incidents.

Transparent Billing – Be accountable for all billing with a suitable system and practices to ensure that the client understands as well as approves all billing from you.

Where support billing exceeds fixed prices within the SLA, ensure that job control sheets are used to gain client approval for all additional work or equipment supplied. Provide a copy to the client. All additional billing should be fully itemized within invoices sent to the client. Have a centralized billing process to pull all 3rd party and partner activities into a single bill for the client.



Category 4

Business Management

In addition to the intelligent business practices defined within this Channel Standard, please refer to the *CompTIA Channel Standard for IT Solution Providers* (and complementary workbook) for more information on these **Business Management** topics:

- **Skills Development Program** – Match the business’ Training Needs Analysis (TNA).
- **Appraisal Systems** – Have a system of appraisal and performance for staff.
- **Maintain Confidentiality** – Information pertaining to the IT solution is controlled.
- **Use Confidentiality Agreements** – Ensure use of confidentiality agreements.
- **Health and Safety** – Legal requirements are met and employees are safeguarded.
- **Job Descriptions** – Recruit staff with well thought out job specifications.
- **Screen Applicants for Sensitive Jobs** – Due diligence is ensured when appropriate.
- **Act on Customer Feedback** – Ensure good communications and effective feedback.
- **Termination Procedure** – Protect the physical and intellectual property of the business.
- **Cash Management** – Adequate funds are maintained to support the business.
- **Compliance to Standards** – Demonstrate compliance with legal, IT, and cultural standards.
- **Connected Systems** – Integrate business processes and systems to benefit clients.
- **Software Author Relationship** – Maintain relationships with 3rd party software authors.

Additional Emphasis on Connected Systems – Incorporate as much automation and as many interconnected systems as feasible.

As a Managed IT Service Provider, end-to-end integration from customer acquisition through help desk, resourcing, SLA management, knowledge management, and client management helps reduce cost and improve customer relationships.

Category 5

Business Direction

In addition to the intelligent business practices defined within this Channel Standard, please refer to the *CompTIA Channel Standard for IT Solution Providers* (and complementary workbook) for more information on these **Business Direction** topics:

- **Business Planning and Continuity** – Objectives are planned and understood.
- **Re-use** – Identify and reuse common elements within your business to reduce risk.
- **Agility/Resilience** – Ensure the number of change requests does not exceed the need to innovate.
- **Operational Reviews** – Make sure that the business works effectively in its day-to-day activities.
- **Measurements** – Control what the business is doing and be aware of its performance.
- **Self-assessment** – Ensure good practice in IT.

Additional Emphasis on Reuse – Identify and reuse common elements within your business to reduce risk.

Maintain a Change Management System (CMS). Wherever possible, develop and use standard project plans or sections of plans in addition to specification and job control sheets that you know work. Ensure all forms and templates are centrally approved then communicated to and used by all staff.

