The CompTIA MSP Guidebook:

Cultivating a Culture of Process Efficiency

Table of Contents

Introduction

The CompTIA MSP Guidebook serves as a framework for managed service providers (MSPs) to create a culture of process efficiency, by first identifying areas of improvement, then implementing best practices and strategically building awareness.

This guidebook is not just a document—it's a catalyst for transformation, designed to empower MSPs to elevate their operational effectiveness to new heights. The guidebook provides you with the tools to examine every aspect of your operations, revealing opportunities for improvement that may have previously been overlooked, and offering a wealth of best practices to implement in your quest for efficiency. These strategies have been meticulously curated from the industry's most successful players, providing you with a tried-and-tested blueprint for success.

Use this guide to start from scratch or pinpoint an area that needs improvement. Whether you're building your MSP operations from the ground up or looking to fine-tune an existing setup, the CompTIA MSP Guidebook, created by technology professionals serving on the CompTIA North America Managed Services Committee, is your go-to resource. It's not about where you are now; it's about where this guide can take you. So, dive in and start your journey towards a culture of process efficiency today.
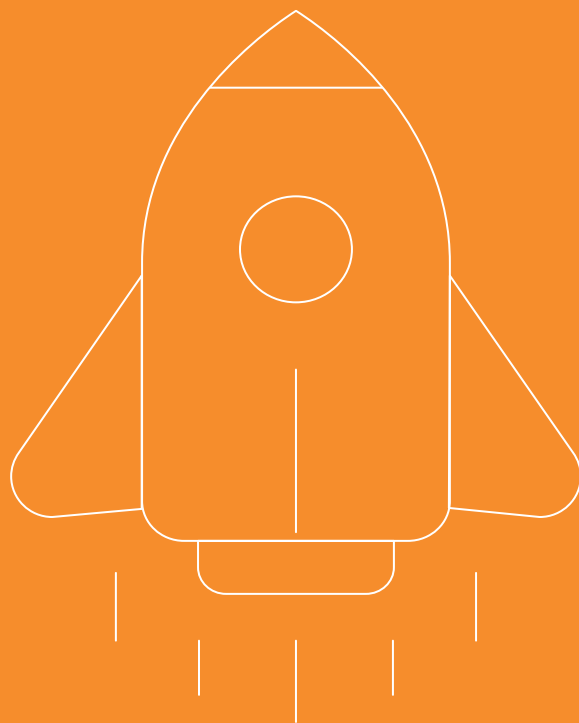
Assess Your Service Portfolio

How can you create a compelling value proposition that differentiates your company from competitors?

It's All About Your Ideal Customer

Understanding your ideal customer profile (ICP) is a cornerstone for success in the competitive landscape of MSPs. By delving deep into the needs and preferences of your target audience, you gain the power to tailor your services, marketing efforts and operations to align perfectly with your ideal clients.

Understanding your ICP enables you to attract the right clients, customize your offerings, differentiate yourself from competitors and deliver exceptional customer experiences, ultimately leading to business growth and success.

What Customers Should I Target?

In the beginning, it is beneficial to be opportunistic (serve as many types of customers as you can). But as you grow and mature, you should narrow your focus to the customer where you win the most.

Consider these factors when creating your ICP:

- **Industry Focus:** Industries like healthcare, finance, legal, manufacturing and professional services often require reliable IT services to support their operations effectively.

- **Business Size:** Small to medium-sized businesses (SMBs) with 10 to 250 employees are more likely to require outsourced IT services due to limited in-house resources. But businesses with fewer than 10 employees often need extra attention to justify the value of the MSP cost. Businesses with 100+ employees may require additional assistance with strategy and compliance.

- **Geographical Location:** Identify where you can provide efficient onsite support. Remember that remote support can be provided regardless of the location.

- **IT Budget:** Identify companies that understand the importance of technology investment and its impact on their operations.

- **Pain Points:** Identify specific IT challenges commonly faced by SMBs and tailor your sales pitch to address these directly.

- **Scalability:** Look for businesses with growth potential and expansion plans. Organizations that are planning to grow will benefit from scalable IT solutions, providing you with long-term sales opportunities.

- **Compliance Requirements:** Focus on industries with stringent regulatory compliance needs, such as healthcare (HIPAA), finance (PCI DSS) or legal (data privacy laws). Position your services as a solution to help clients meet and maintain compliance, as this can be a critical factor for businesses in these sectors.

- **Digital Transformation Readiness:** Target businesses that are open to digital transformation initiatives. These companies are more likely to invest in technology upgrades and be receptive to innovative IT solutions that can help drive their digital transformation.

- **Value of Downtime:** Identify businesses that heavily rely on their IT infrastructure and understand the cost and impact of downtime.

Where Do I Win?

If you already have a set of customers, let's understand where you win. Complete the table below to inform your ICP.

Customer Name	IT Budget	Annual Revenue	Industry	Employee Size	Region	Pain Points

Do you see any trends? Are there more customers of a specific size, industry or pain point? Are there other types of customers that don't fit the mold at all? By identifying trends, you can narrow your focus to a specific type of customer.

BONUS TIP! Remember to regularly review and refine your ideal client profile based on the success of your sales efforts, market trends and customer feedback. Continuously adapt your approach to target the most promising opportunities.

Understanding Who You're Up Against

There are a LOT of players in the IT industry, but some are more direct than others. The goal is to identify who your direct competitors are while understanding some secondary and tertiary players you may run into.

- **Primary competitors** are your direct competitors that look similar to your organization from a size and capability standpoint. They offer a similar version of your solutions and target the same customers or market.

- **Secondary competitors** look similar but may offer a subset of your solutions and may target the same or different customers or markets.

- **Tertiary competitors** may offer related products and services but look different firmographically. These companies may be beneficial to partner with further down the line.

Use the table below to map out your competition:

Competitor	Annual Revenue	Finances	# of Employees	Services Provided	Technology Supported	Regions Supported	Company Type	Tally

Next, circle the cells that match your company's responses. Then tally the number of circles. The competitors that have the most overlap would be considered primary competitors. The next set of competitors would be tier 2. And the least similar competitors would be considered tier 3.

Having trouble filling out the table? Use these resources for competitor research:

- **Google:** Search for companies in your region that offer similar services; for example, MSP in Chicago.
- **Lists:** Award lists like CRN MSP 500 or Channel Futures 501 are great places to start.
- **Social Media:** Social platforms can provide a lot of insight, like LinkedIn company pages.
- **Competitor Websites:** You can learn a lot about your competitors by walking through their websites.

BONUS TIP!

Make sure you are comparing apples to apples. For example, cybersecurity is on the top of every MSP's mind and is often included in portfolios. However, what do you mean by cybersecurity? Do you have a SOC? Do you have dedicated cybersecurity experts on your team? Understanding your depth of capabilities helps you make sure you are comparing your company to the right competitors.

Uncover Your Superpowers
Your core capabilities represent the unique strengths, expertise, resources, and superpowers that set your MSP apart from others in the market.

Your Superpower: Your Employees
Your employees are a valuable asset that can provide a significant competitive advantage. By investing in their growth and development, an MSP can unlock the full potential of their workforce.

Ask yourself these questions:
- What certifications do the people on my team possess that demonstrate their expertise and credibility, reinforcing trust and confidence in our current and future clients?
- How many years of experience does your team have collectively?
- What incentives do you offer to cultivate a culture of continuous learning for your team?
- How do I promote personal responsibility within my team by encouraging ethical practices, sustainability initiatives and corporate responsibility?

Your Superpower: Your Competitive Advantage
Your competitive advantage is the differentiating factor that sets successful MSPs apart from the rest.

Ask yourself these questions:
- What certifications can my MSP acquire to showcase our expertise and credibility, reinforcing trust and confidence to our current and future clients?
- What awards has my MSP earned from vendors, distributors, or our local community to showcase our expertise and credibility?
- When was the last time a client expressed gratitude for our services? Can we share this testimonial with others?

Your Superpower: Your Vendor and Distributor Relationships

Forming and maintaining strong relationships with vendors and distributors can be a game-changer. These partnerships can provide access to quality products and services, enhance your service portfolio and offer competitive advantages in the marketplace.

Here's how to leverage vendor and distributor relationships to build differentiation and gain a competitive edge:

1. When selecting vendor partners, prioritize those with a strong reputation for delivering high-quality products and services.
2. Concentrate on a select few vendors that can provide you with a comprehensive range of products and services can be immensely beneficial.
3. Establish strong connections with vendor sales representatives and account managers to foster a collaborative environment and lead to more favorable terms.

Ask yourself these questions:
- What vendor partnerships do you have?
- Do those partnerships provide tier programs with better margins?
- Do those partnerships align with your technology and services stack?
- Do those partnerships align with your current business goals?
- Do the vendors you have partnerships with have clear and comprehensive Service Level Agreements (SLAs)?
- What partner awards do you have?
- Is your sales team aligned with the partner's sales team?

Your Superpower: Your Processes

Efficient and well-defined processes can be a powerful differentiator. Having structured processes not only streamlines your operations but also ensures a consistent and high-quality service delivery to your clients.

Ask yourself these questions:
- Do we have a well-defined onboarding process in place for new clients?
- How do we assess a client's business goals and IT infrastructure to tailor our services?
- Are we effectively gathering information about security requirements?
- Do we have a clear documentation process?
- How do we generate and submit proposals to prospective clients?
- Is our SLA well-drafted and reviewed by an attorney with expertise in the MSP space?
- Are we open to customizing the SLA to align with the needs of each client?
- Do we have a systematic approach to kick off projects?
- How do we define responsibilities, timelines, and communication channels?
- Do we conduct regular project updates?
- How do we manage partner accounts with vendors and manufacturers?
- Are we sticking with products that align with our team's expertise?
- How often do we review our product stack to identify opportunities?

Your Superpower: Your Competitors

Believe it or not, building strong partnerships with other service providers can be a valuable strategy to enhance your competitive advantage and differentiation. By collaborating with like-minded professionals, you can leverage each other's expertise, resources, and networks to strengthen your service portfolio and expand your market reach.

Here's how to make the most out of these partnerships:

- **Network and Engage:** Immerse yourself in the channel community by attending conferences, industry events and networking sessions.

- **Join Industry Groups:** Become a member of industry groups (like CompTIA) and others relevant to your niche. Being part of these groups exposes you to potential partnership opportunities and keeps you informed about emerging technologies and market developments.

- **Participate in Peer Groups:** Seek membership in peer groups that align with the type of services you offer to your clients. Engaging in peer group discussions allows you to learn from others' experiences, exchange best practices and gain valuable insights.

- **Foster Open Conversations:** Cultivate an environment of openness and trust when interacting with other service providers. Be willing to share your business operations, successes and struggles. In return, you'll benefit from the collective wisdom of the community.

- **Collaborate and Share Referrals:** Strong relationships with other service providers can lead to mutual referrals and collaboration on projects. When your strengths complement each other, collaborating on client engagements can enhance the overall service quality and deliver exceptional value to your clients.

- **Explore Partnerships and Mergers:** As your relationships with other service providers grow, you may discover opportunities for strategic partnerships or even mergers. Combining resources, expertise and client bases can lead to a more comprehensive service offering and an expanded market presence.

- **Leverage Shared Marketing Efforts:** Partner with other service providers on joint marketing initiatives like webinars, whitepapers, or co-hosted events.

Your Superpower: Your Defined Services

By taking customer feedback and industry research into account, you can create a service portfolio that sets you apart from competitors.

Ask yourself these questions:

- Are we actively seeking feedback from our clients to understand their satisfaction levels?
- How are we incorporating customer feedback into the development of new services?
- How frequently do we research industry trends and reports to stay informed about the latest developments?
- Have we implemented any best practices recommended by reputable industry sources?
- Do we have a clear understanding of our team's current capabilities?
- Are there any gaps in our team's skills that may limit our abilities?
- Do we have comprehensive documentation for each service?
- Are our service descriptions easy to understand and aligned with customer needs?
- How do we measure the success of each service we offer?
- What services do we consistently receive high feedback on?
- How open are we to adopting new technologies?
- Are we agile enough to adapt our services to meet evolving industry trends and needs?

Now you can take the information you have about your direct competitors, try to identify their strengths and weaknesses, and match up your superpowers to show how you can win against them. In some cases, you may be well-positioned, in other cases, you may need to strengthen your capabilities.

Use this table to map out your strategy:

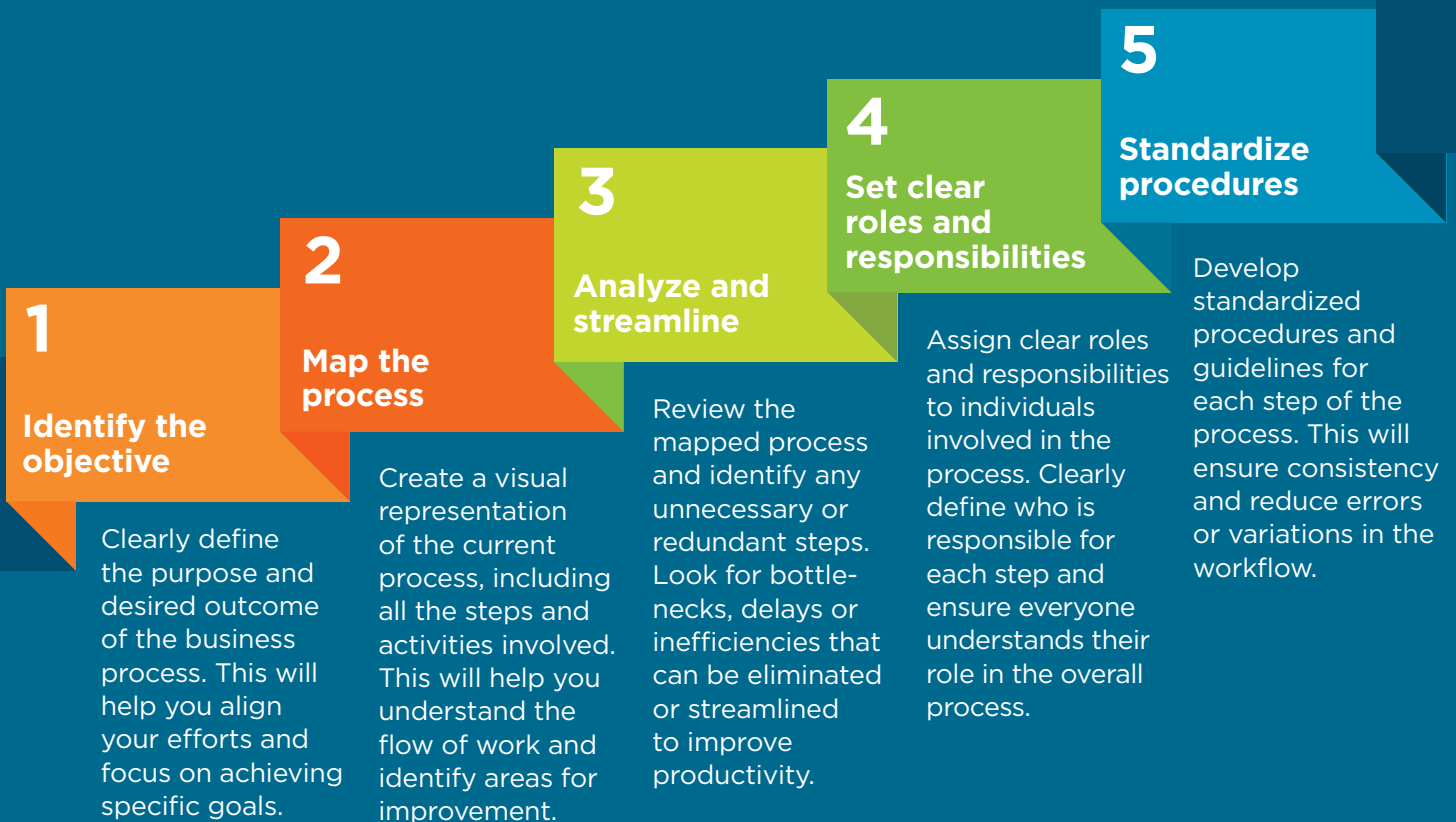| Competitor	Their Weakness	Their Strength	Strategy to Win

In the competitive landscape of MSPs, service portfolio management is paramount for differentiation and success. Understanding your ideal customer, competitors, core capabilities and unique differentiators empowers you to tailor your services and marketing efforts effectively.

Build Effective Business Processes

Establishing effective business processes is crucial for organizations to streamline their operations, enhance efficiency and achieve desired outcomes.

10 Steps to Maximize Your Processes

1

Identify the objective

Clearly define the purpose and desired outcome of the business process. This will help you align your efforts and focus on achieving specific goals.

2

Map the process

Create a visual representation of the current process, including all the steps and activities involved. This will help you understand the flow of work and identify areas for improvement.

3

Analyze and streamline

Review the mapped process and identify any unnecessary or redundant steps. Look for bottle-necks, delays or inefficiencies that can be eliminated or streamlined to improve productivity.

4

Set clear roles and responsibilities

Assign clear roles and responsibilities to individuals involved in the process. Clearly define who is responsible for each step and ensure everyone understands their role in the overall process.

5

Standardize procedures

Develop standardized procedures and guidelines for each step of the process. This will ensure consistency and reduce errors or variations in the workflow.

6

Implement Automation and Technology

Identify opportunities to automate repetitive or manual tasks using technology. Implementing tools and software can streamline processes, improve accuracy and save time and resources.

7

Communicate and Train

Effective communication is key to successful process implementation. Communicate changes, updates and expectations to all relevant stakeholders. Provide necessary training and support to ensure everyone understands and adopts the new process.

8

Monitor and Measure

Establish metrics and key performance indicators (KPIs) to measure the effectiveness of the process. Regularly monitor and evaluate performance against these metrics to identify areas for further improvement.

9

Gather Feedback and Iterate

Encourage feedback from employees and stakeholders who are involved in the process. Analyze their suggestions and insights to identify opportunities for further optimization. Continuously iterate and refine the process based on the feedback received.

10

Document and Update

Document the optimized process, including all the changes and improvements made. Maintain clear documentation that outlines the steps, roles and responsibilities involved. Regularly review and update the documentation as the business evolves and new opportunities arise.

Build a Better Process: Quarterly Business Reviews

Quarterly business reviews (QBR) serve as crucial checkpoints where both parties come together to evaluate the progress, performance and overall health of their partnership. These meetings provide an opportunity to assess the effectiveness of strategies, address challenges and align objectives for future growth.

5 Reasons MSPs Should Engage in QBRs

1 **Relationship Building:** QBRs provide an opportunity for MSPs to strengthen their relationship with their clients. By engaging in face-to-face or virtual meetings, MSPs can foster open communication, understand the client's goals, and align their services accordingly. Regular QBRs help build trust and rapport, allowing MSPs to become trusted advisors rather than just service providers.

2 **Performance Evaluation:** QBRs allow MSPs to evaluate their own performance and demonstrate the value they bring to the client's business. By reviewing the performance metrics and discussing the outcomes achieved, MSPs can showcase their expertise, highlight areas of improvement, and discuss future plans. This evaluation helps clients understand the value they receive from the MSP and justifies the investment in their services.

3 **Strategic Alignment:** QBRs enable MSPs to align their services with the client's business objectives. By understanding the client's long-term goals and plans, MSPs can make strategic recommendations and propose solutions that address specific challenges or opportunities. QBRs facilitate discussions about technology road-maps, upcoming projects, and potential enhancements, ensuring that the MSP's services remain aligned with the client's evolving needs.

4 **Proactive Issue Resolution:** QBRs provide a platform for identifying and resolving any ongoing or potential issues. By discussing any challenges or concerns faced by the client, MSPs can take proactive measures to address them before they become significant problems. QBRs allow for open dialogue, problem-solving, and collaborative decision-making, helping both parties stay ahead of potential disruptions and ensure a smooth operation.

5 **Client Satisfaction and Retention:** Regular QBRs demonstrate that the MSP is committed to the success of the client's business. By actively engaging in strategic discussions and evaluating performance, MSPs show that they are invested in the client's outcomes. This level of attentiveness enhances client satisfaction and improves the likelihood of long-term retention. QBRs also provide an opportunity for clients to voice any concerns or provide feedback, enabling MSPs to take appropriate action and enhance their services.

CompTIA.

Use this checklist for your QBRs:

☐ Review Service Level Agreements (SLAs): Evaluate the performance against SLAs for each client, ensuring that agreed-upon service levels are being met.

☐ Customer Satisfaction: Gather and review customer feedback, satisfaction surveys and testimonials to assess client satisfaction levels.

☐ Service Delivery Metrics: Analyze key metrics such as response time, resolution time, uptime, and availability to measure the effectiveness of service delivery.

☐ Client Retention and Expansion: Evaluate client retention rates and identify opportunities for upselling or expanding services to existing clients.

☐ Financial Performance: Review financial data, including revenue, profitability, and cost analysis, to assess the overall financial health of the business.

☐ Contract Renewals: Identify upcoming contract renewals and discuss strategies to retain clients and negotiate favorable terms.

☐ Project Updates: Provide updates on ongoing projects, milestones achieved, and any challenges or roadblocks encountered.

☐ Security and Compliance: Review security measures, compliance requirements and any incidents or breaches that occurred during the quarter.

☐ Technology Updates: Discuss technology trends, advancements and any new tools or software that can enhance service delivery or improve efficiency.

☐ Team Performance: Evaluate the performance of the MSP team, including individual contributions, training needs and areas for improvement.

☐ Client Onboarding and Offboarding: Assess the efficiency and effectiveness of client onboarding and offboarding processes, identifying areas for improvement.

☐ Risk Management: Identify potential risks and vulnerabilities in the MSP operations and discuss strategies to mitigate and manage them.

☐ Business Growth and Marketing: Evaluate marketing initiatives, lead generation efforts, and discuss strategies for business growth and expansion.

☐ Client Feedback and Recommendations: Discuss any client feedback, suggestions, or recommendations for improving the services provided.

☐ Future Planning and Goals: Set strategic goals and objectives for the next quarter, aligning them with the overall business strategy.

Build a Better Process: Customer Success Roadmap
Strategy doesn't come naturally, and customer success seems like a moving target, so how do you build them out in a meaningful way?

1. Pre-Meeting Planning
One of the most important things that MSPs can do is educate their end user prior to a first meeting. This can be accomplished by delivering content that is specific and relevant to a customer's industry, their business, or their needs.

Here are some actions you can take prior to a first meeting:

- Send an "about us" email with meaningful content about your company and process
- Email some statistics and content relevant to the customer and/or their market
- Invite the customer to a webinar, either your own or from a vendor, which can help educate them on your solution and value
- Send a meeting reminder email to ensure the customer's decision makers will attend (and reschedule if they can't)

2. The First Meeting
The goal of an initial meeting is to help both parties get to know one another and make sure your plan spells success for the customer.

Make your first meeting a big success:

- **Ask questions and clarify pain points.** Remember to ask questions that are relevant to your offering. Share relevant and similar pains that you've helped eliminate for similar company types.
- **Understand needs and define budget.** Clarify the customer's actual needs and budget as it relates to your offering.
- **Reinforce how your offering meets their needs.** Ensure that you can clearly articulate what you can do by illustrating outcomes. Follow up with meeting notes and next steps.
- **Assess the customer's environment.** Take the time to fully assess the customer's environment, documenting information about all networks, servers, PCs, applications, and other tech areas. Using a variety of MSP tools can help with automated discovery.
- **Follow up.** Keep communication ongoing, especially after every major milestone in your process. Make sure deliverables and outcomes match up with customer expectations.

3. The Findings and Recommendation Meeting
The importance of this next meeting is to make sure that you can document what you will do—and how you will support it. This is where you share your QBR process.

Take your time to explain everything that you discovered and documented. This is the moment you could win or lose the deal. This is when you focus on building trust and having strategic business conversations about the *why you*.

4. The Closing Meeting
This is when you will present proposed contracts and pricing, schedule onboarding and talk implementation. Some MSPs view this as an optional meeting but it is a good idea to schedule this and include decision makers in the process.

5. The Onboarding Meeting
This is a good time to set realistic expectations on timelines for completion and ensure that everyone understands your onboarding process.

During the onboarding meeting make sure you:
- **Clarify objectives.** Be clear on what you will be doing. Clearly articulate the products and programs you will be implementing.
- **Set timelines.** Define the timelines and process that will occur during the relationship and what should be expected and when.
- **Educate staff.** Make sure that not only the stakeholders understand your program but also the entire staff. Take time to educate everyone.
- **Communicate the plan.** Communication is essential to success. Interact often and with the right people. Make sure you have a plan for this.

6. The Ongoing Strategy Meeting/Call
Plan an ongoing bi-monthly strategy call or meeting to keep momentum going. Review the current plan and its performance and ask questions to ensure you are meeting the customer's current needs. This is also an opportunity to review progress to-date. Your plan should have some goals based on measurables. Make sure that the customer can also see the progress.

BONUS TIP! It's OK to refrain from doing business with a customer that does not fit your program or plan. Most importantly, don't take on a client that doesn't allow you to make a profit. You won't stay in business if you can't afford to run it. With a comprehensive plan, program, and documented procedures for customer success you will enjoy greater success in your business!

Invest in People

Did you know that finding a great new hire can start well before the interview process? Did you know that once you hire your new candidate the coaching and monitoring of their work, growth and behavior continues?

Best Practices: Before You Hire

Always Be Recruiting
The more you connect to others outside of your regular circle, the more you will be comfortable with networking and delivering your company's value and why you are different from the rest.

Start by meeting job seekers where they are:

- Professional associations/conferences, CompTIA ChannelCon would be a great start
- Public speaking engagements allow you to meet and connect with your audience
- Alumni events for your alma matter or sign up at a local university, college or community college
- Chamber of Commerce events in your local town or nearby city
- Faith, charity or volunteer events give you the opportunity to talk to folks about career opportunities

What Do You Need in a Candidate?
Consider what is needed now and take a bit of time to determine what will be needed in the future. Here are a few questions to consider:

- Do you need the candidate to fulfill a role and remain in that role for your business?
- Do you think the candidate you hire today can grow with your strategy?
- Do you have time to nurture a candidate for a potential future need role?
- Do you have a pipeline opportunity where you will immediately require staff?

What Are Your Non-Negotiables?
Non-negotiables are items that don't align with your core values or what is required for the role. Take the time to document your non-negotiables. A few examples may be:

- Must be punctual
- Must be hygienic
- Must be presentable
- Must have a positive attitude
- Must be motivated
- Must have PMP certification
- Must have CompTIA Security+ certification

Best Practices: The Hiring Process

Writing a Job Description
You can find common job descriptions online, but the most effective way to ensure you're attracting the right applicants is by creating a skills-based job description specifically for your company. Switching to a skills-based hiring approach doesn't have to be complicated. It starts with writing job descriptions that are focused on skills.

Here's how you do it:

1. Make college degrees preferred, not required. In IT, college degrees can be over-valued. Nevertheless, it is okay to want to hire job candidates who possess college degrees. After all, degrees show that individuals can complete long-term goals and have significant knowledge in a specific area of interest. But if you want to switch to skills-based hiring, stress in your job descriptions that four-year degrees are preferred, not required.

2. List alternative ways candidates could have gained necessary skills. Some employers may believe that relaxing their degree requirements for tech jobs will lead to attracting job candidates who are unqualified and unskilled. This isn't the case. There are other ways candidates can attain skills needed for a job without getting a degree. Skills-based job descriptions show candidates that the hiring organization embraces alternative credentials, such as IT certifications, IT certificates or relevant work experience.

3. Spell out each job's required skills. The most important step in writing a skills-based job description is listing the specific skills the job calls for, without requiring that the candidate gleaned those skills via a four-year degree.

*Use **CompTIA's Job Posting Optimizer** to help create skills-based job descriptions.*

Interviewing 101

During an interview it's important to assess the candidate's technical skills, durable skills, experience, personality and attitude. There's a lot riding on the interview for you as the employer. Choose your questions carefully.

For all roles, consider these team-oriented questions:

- Can you describe a time when you disagreed with a team member and how you handled it?
- How do you ensure effective communication within a team, especially during high-pressure situations?
- What strategies do you use to manage stress and maintain productivity in a fast-paced IT environment?
- How have you contributed to fostering a positive team culture in your previous roles?
- Can you provide an example of when you mentored or helped a less experienced team member with a technical problem?

For an entry-level help desk role, consider these technical questions:

- Can you walk me through the process of setting up an email account on a client's new device?
- How would you troubleshoot a computer that's running slow?
- Can you explain what DHCP is and why it might be important for our work?
- What steps would you take to troubleshoot a printer that is not printing?
- How would you troubleshoot if a user cannot connect to the internet?

For a mid-level help desk role, consider these technical questions:

- Can you describe the process of setting up a secure VPN for remote users?
- How would you handle a situation where multiple users report the same software bug?
- Can you explain the steps to restore a client's machine using a backup?
- What steps would you take to troubleshoot a server that is running slow?
- How do you go about diagnosing and fixing an issue where emails are not being sent or received in Outlook?

For a network engineer role, consider these technical questions:

- Can you explain the process of setting up a firewall for network security?
- How would you go about troubleshooting a low-bandwidth issue in a company-wide network?
- Can you describe a situation where you had to implement a complex routing protocol and how you ensured it was successful?
- What experience do you have with cloud-based network management?
- Can you explain how you would set up secure remote access for a large team?

To better understand a candidate's mindset, consider these questions:

- Can you share how you've adapted to remote work?
- What tools and strategies have you used to stay productive while working remotely?
- What new technologies or tools have you learned in the last year? How have they improved your work?
- Tell me about a recent project where you had to learn and apply new technology.
- Can you share an experience when you worked in a diverse team? How did you handle conflicts or disagreements?
- What does a diverse and inclusive workplace look like to you?
- How do you think tech companies should approach sustainability?
- How have you incorporated sustainability into your professional or personal life?
- Tell me about a time you had to deal with a significant setback at work. How did you handle it?
- How do you manage stress and avoid burnout?
- How do you ensure you're continuously learning and staying updated?
- Can you share the latest professional development course or certification you've completed?
- How do you ensure data security and privacy in your current role?
- What are your thoughts on the impact of AI and automation?
- Can you share how you've collaborated with a team virtually? What challenges did you face?
- How do you see your role evolving in the next 3-5 years with advancements in technology?
- What emerging tech trends do you think will have the most impact on your role, and why?

To get to know a candidate on a personal level, consider these questions:

- Tell me about a time when you were proud of something you accomplished
- What's the most rewarding experience you've had, either professionally or personally?
- How do you like to spend your free time?
- What are you passionate about?
- If you could have dinner with anyone, living or dead, who would it be, and why?
- What's the best book you've read recently and why did you like it?
- How do you handle stress and pressure, especially during challenging situations at work?
- What are you currently learning, or curious about?
- Describe a situation when you received criticism. How did you respond to it?

To understand if a candidate is a good fit for your company culture, consider these questions:

- What motivates you to come to work every day?
- Tell me about a time you went above and beyond at work. What prompted this?
- What did you like the most about your last job?
- What type of work environment do you thrive in?
- What would make you leave a job?
- How do you define success?
- What are you looking for in terms of career development?

Interviewing Candidates Without Technical Experience

If you're interviewing candidates for a technical position and they're just starting out or don't have much technical experience, it's essential to approach the interview differently than you would with an experienced candidate.

Here are some suggestions on how to prepare:

1. Understand the Position: Even if you're not technically inclined yourself, make sure you understand the key skills and knowledge that the position requires. Speak with someone who is an expert in the area or a manager who oversees that position to get a clear understanding of the technical skills that are necessary.

2. Emphasize Durable Skills: While technical skills are important, durable skills such as problem-solving, communication, teamwork and adaptability are also vital. These skills can often be more important than technical skills, especially for entry-level positions. Ask behavioral questions that allow the candidate to demonstrate these skills.

3. Assess Problem-Solving Skills: For technical positions, the ability to troubleshoot and problem-solve is crucial. You can present hypothetical problems or scenarios and ask how they would approach solving them. This can give you insights into their thought process and problem-solving skills.

4. Look for a Willingness to Learn: If a candidate is inexperienced, it's essential that they are eager to learn and grow. Ask about any self-learning they've done, such as online courses, coding challenges or personal projects. Also ask about their plans for continued learning and growth.

5. Test Basic Knowledge: While they may not have much experience, they should have some basic technical knowledge relevant to the position. You can ask straightforward technical questions or have them explain basic concepts to you. This can give you a sense of their foundational knowledge.

6. Use Technical Assessments: If you feel ill-equipped to judge a candidate's technical skills, consider using technical assessments or skills tests. These can be administered by a third party and can provide an objective measure of a candidate's technical abilities.

7. Bring in a Technical Expert: If possible, have a technical expert sit in on the interview. They can ask more technical questions and better evaluate the candidate's responses. Even if they're not there for the whole interview, they can be brought in for a portion of it.

Testing the Candidate for Technical Knowledge

There are a variety of resources, both free and paid, that can be used to test candidates for knowledge in technical aspects of help desk support for both PC and Apple support. Here are a few suggestions:

- TestDome (https://www.testdome.com/): Offers a range of technical tests, including IT and system administration. It allows you to test candidates on real-life problems.

- Indeed Assessments (https://www.indeed.com/assessments): Offers a wide variety of skill tests, including those related to IT support, that can be sent directly to candidates.

- eSkill (https://www.eskill.com/): Provides a variety of pre-employment tests, including IT skills testing. eSkill's tests can be customized to the job and the skills required.

- Brainbench (http://www.brainbench.com/): Offers a wide array of tests, including ones for technical help desk roles.

- Kandio (https://kand.io/): Provides tests specific to IT roles including network trouble-shooting, IT support and Windows system administration.

- Lynda / LinkedIn Learning (https://www.linkedin.com/learning/): Not strictly a testing platform, but you can assign specific courses to potential hires and see how they perform in the tests that follow each course.

- HackerRank (https://www.hackerrank.com/): Originally a platform for developer assessments, it now includes roles like system administrator.

- Pluralsight Skill IQ (https://www.pluralsight.com/product/skill-iq): This platform can assess your candidates' skills in specific areas like IT ops.

For Apple-specific testing, you might want to use resources that are dedicated to Apple technology:

- Apple Certified Support Professional (ACSP) (https://www.apple.com/shop/product/MA714Z/B/apple-certified-support-professional-1014): Though more of a certification, it verifies understanding of Apple technology, making it a useful resource for testing potential hires.

Best Practices: Onboarding New Hires

Effective onboarding plays a crucial role in setting new employees up for success. A well- structured onboarding program provides new hires with the necessary knowledge and added skills to perform their job effectively.

Assign an Onboarding Buddy

Assigning an onboarding buddy introduces the new hire to the company's values, mission, and culture to foster an early sense of belonging and connection. This can facilitate a smooth integration process, reducing stress and imposter syndrome for the new employee.

Consider the personality of the new employee and match them as well as you can within your organization. (This works best if your internal team leans in and volunteers to step up as onboarding buddies in advance!)

Create 30/60/90-Day Roadmaps

Creating a 30/60/90-day roadmap outlines milestones in productivity output. In a technical role, this likely includes various certifications, but don't limit yourself to just those things. Include software to be trained on (CRM, RMM, PSA, Zoom, etc.) and when that training will be completed and who is responsible for it.

KPIs and metrics should be included in the 30/60/90-day roadmap as well. These must be SMART (specific, measurable, attainable, relevant, and time-bound) goals. Ensure that these metrics align with the overall company objectives and discuss the why behind them.

Consider a scorecard type of visual tracking that allows you both to see when roadmap milestones are achieved in the 30/60/90-day plan and if the employee is on track to meet the KPIs. Being able to check this at the start of each week will help everyone understand if adjustments need to be made or more time needs to be allocated to areas where the employee is struggling.

Regularly Meet 1:1

Schedule a 1:1 weekly meeting for the new employee and their manager - and stick to it. Using the above-mentioned scorecard for discussion/coaching points at this meeting is very helpful.

Create an agenda for this meeting that allows time to:
- Address challenges or concerns
- Provide supportive feedback
- Review scorecard metrics
- Have hard conversations, if necessary

Here's some ideas:

Purpose:

What are you proud of since we last chatted?

Growth:

Has there been anything in the past two weeks that you want to reflect on?

Connection:

What was the best or toughest interaction you had this week (team, customer, meeting, email, etc)

What's Next:

Is there anything coming up that you're looking forward to or worried about?

Feedback Bonus Question:

Share a decision or interaction for feedback.

Manager Sharing Bonus Question:

Share a reflection on a current Team/Department Goal. How do you see your work connected to or in support of that.

Manager Sharing Bonus Question:

Share insight from the broader team/department leadership team. What is your reaction?

Manage Your Vendor Partners

Vendor management is not merely about engaging with third-party suppliers; it is a strategic discipline that directly impacts an MSP's ability to deliver quality services, enhance operational efficiency and build trust with clients. The importance of effective vendor management cannot be overstated, as it serves as the foundation for a resilient and reliable IT infrastructure.

Making Informed Partnership Decisions

The process of identifying reliable vendors amidst a sea of options can be daunting and overwhelming. To empower MSPs in making well-informed partnership decisions, use the guidelines below. By evaluating potential vendors based on a set of criteria, MSPs can confidently establish partnerships that not only complement their service offerings but also align with their long-term business objectives.

The Vendor Vetting Process

1. Define your requirements
   a. Identify the needs of your business or the client
   b. Determine the type of vendor that is needed
      i. Hardware
      ii. Software
      iii. Cloud
      iv. Security
      v. Other
2. Research potential vendors
   a. Search for industry leaders and vendors with good reputations
   b. Seek out industry publications and forums (technical and strategic)
   c. Seek vendors with high customer satisfaction and positive reviews
   d. Ask for customer referrals at or around your company's volume/size
3. Evaluate vendor capabilities
   a. Evaluate technical capabilities and expertise
   b. Verify any certifications, such as CompTIA certifications or Trustmark's
   c. Research financial stability and length of operation
4. Evaluate vendor's record
   a. Research the vendor's background including reputation, legal history and customer references
   b. Assess security practices and compliance with industry regulations
   c. Verify insurance coverage and other risk mitigation measures
5. Request and evaluate proposals
   a. Ask for proposals from vendors you've researched that have positive progress
   b. Rank vendors according to your comparison of their pricing, SLAs, contract terms and meeting your company's requirements or client's service needs

Some Data Points to Consider

1. Company background and culture
   a. Years in business
   b. Employees
   c. Annual revenue
   d. Financial backing
   e. Reputation and references
   f. Relevant certifications
   g. Outstanding legal entanglements
   h. Corporate culture
2. Product and/or service
   a. Type of product/service
   b. Other product lines
   c. Primary focus
   d. Product-specific requirements
3. Service-level agreements
   a. Uptime guarantee
   b. Response and resolution times
   c. Remedy for SLA breach

4. Security and compliance
   a. Relevant compliance requirements
   b. Certified requirements
   c. Data protection practices
   d. Access to end user data
   e. Encryption methods
   f. Data resident
   g. Disaster recovery plan
   h. HIPAA BPA
   i. Sufficient insurance coverage
5. Support and maintenance
   a. First and second level of support
   b. Support team
   c. Maintenance policy
   d. Outage notification
6. Scalability and future readiness
   a. Scale to future needs
   b. Published roadmap
   c. Partner advisory council to drive product development

7. Pricing and contract terms
   a. Pricing
   b. Hidden or add-on costs
   c. Discount levels or requirements
   d. Agreement length/term
   e. Payment terms

Negotiating With Vendors

Vendor negotiation is an essential part of doing business, and it is important to have a strategy in place to ensure success. As an MSP, negotiating with vendors for the best prices and terms can significantly benefit your bottom line.

Here are some best practices to follow when negotiating with vendors.

Do Your Research

Before entering negotiations with a vendor, it is important to do your research. Understand the market and the pricing of the services you will be purchasing. Knowing the competitive prices and terms can ensure that you get the best deal. It is also important to research the vendor you are negotiating with. Knowing the vendor's reputation and experience with other customers can give you an edge when negotiating.

Set Clear Goals

Before beginning negotiations, it is important to have clear goals of what you are looking to achieve. Setting goals can help keep you focused and ensure that you don't get sidetracked during the negotiation. Goals should include not only price but also the terms of the greement, the quality of service provided and the timeline of the project.

Be Flexible

When negotiating with vendors, it is important to be flexible and open to different solutions. Being open to compromise and finding solutions that benefit both parties is often the key to successful negotiations. Try to understand the vendor's point of view and be willing to negotiate on different aspects of the deal.

Communicate Clearly

Clear communication is essential for successful negotiations. Make sure that all parties involved are aware of what is being discussed and that everyone's expectations are being met. Be sure to ask questions and make sure that all points of the negotiation are clear.

Get Competitive Bids

Competition makes everyone better. The first offer is never the vendor's best offer. Make every bid competitive, and keep driving until the vendors say "no, we are done this is our best and final." Also negotiate deals at the end of the quarter when the vendor CFOs are likely to approve big concessions.

Be Prepared

It is important to be prepared for negotiations with vendors. Have all the information you need to make an informed decision and be ready to respond to any questions the vendor may have. Having a clear understanding of the services you are looking to purchase will help ensure that you get the best deal.

Implementing a Vendor Management Policy

A vendor management policy serves as the bedrock for effective vendor partnerships, streamlining the selection, onboarding, and ongoing management processes. Use this vendor management policy template, designed to empower MSPs with a structured framework for building and nurturing vendor relationships, to get started. By adopting a systematic and organized approach, MSPs can mitigate potential risks, enhance operational efficiency, and uphold the highest level of security and compliance.

Vendor Management Policy Template

Document Type: Organizational Policy		Document Ref No: Policy Number	
Controls Addressed:	Regulation/Standard: Compliance Framework	Controls Addressed:	
Created by: Choice Cyber Solutions	Published by: Company Name Client Full Name	Effective from: 1/1/1901	Revised on:

Scope:

This policy and procedures thereof shall be applicable to:
- All office facilities of Company Name.
- Employees and third-party contract workers accessing Company Name's Personally Identifiable Information (PII), Personal Health Information (PHI), and information systems and services.
- Company Name information systems and data maintained by or on behalf of the organization, specifically:
  - Information systems and applications that support the operations and assets of the organization, including those provided or managed by another organization, contractor, or other source, as well as services that are either fully or partially provided.
  - Information systems and applications that are hosted, outsourced or cloud based.

Policy:
1. The establishment and sustainment of vendor management is a process for identifying and assessing risks and threats with third-party providers that support the organization.
2. Company Name shall designate roles and responsibilities for those involved in vendor management.
3. Company Name shall establish management and technical support for vendor management.
4. Company Name shall develop, document, and disseminate this policy to all employees, contactors and users authorized to access organizational information systems, or systems operated or maintained on behalf of the organization.
5. The policy shall be reviewed and updated at least annually or when a major change impacts the validity of the policy and procedures. It shall be disseminated among personnel with appropriate job functions governed by this policy.
6. The policy shall be consistent with any changes to procurement rules or new or significantly changed contracting laws, regulations or policies.
7. The policy shall direct the development of a plan for vendor management risks associated with the organization's business practices.
8. Policies, procedures, and vendor management documents shall be protected from unauthorized disclosure and modification.
9. Due diligence and periodic testing.

Procedures:
• Contract processes shall include vetting third parties and developing contractual language for inclusion into contracts.
• Procedures will include review of third-party privacy policies and non-disclosure agreements.

Vendor Management Controls and Processes:
• Establish a process to determine where IT related processes are conducted on behalf of the organization.
• Establish a process or processes to assess vendors that provide third-party IT services.
• Assessments should be conducted at least annually and should include a process to mitigate vulnerabilities through a plan of action and milestone (POA&M) process.
• The POA&M process should be reviewed by the appropriate organization team member(s) to ensure mitigations are effective.
• Document selected and implemented vendor management processes and controls in associated system documentation.

Risk Management:
• Identify risks based on risk tolerance levels and the organization's mission and data sensitivity.
• Assess risks based on applicable laws, regulations, and guidance.
• Address and manage risks via corrective action process/POA&M process.
• Monitoring of risks, risk tolerance levels and re-assessment and testing follows organizational processes.

Vendor Management Agreements:
• Establish agreements and procedures with entities involved in Company Name processes
  via contract agreements.

Version	Date	Change Summary	Approved By
1.0	1/1/1901	Initial draft	Name, Title

Additional Resources

Consult these resources for more information as needed.

CompTIA Marketing Toolkit for MSPs
https://my.CompTIA.org/resource-library/content/marketing-toolkit-for-msps
CompTIA members get exclusive access to the new Marketing Toolkit for MSPs,
a completely refreshed, step-by-step guide designed for solution/service providers
who want to leverage marketing to compete and grow their business.

CompTIA Cybersecurity Resources for MSPs
Connect.CompTIA.org/resources/cybersecurity

CIS Software Supply Chain Security Guide
 https://www.cisecurity.org/insights/white-papers/cis-software-supply-chain-security-guide

CISA Vendor Supply Chain Management
https://www.cisa.gov/sites/default/files/publications/ICTSCRMTF_Vendor-SCRM-Template_508.pdf

https://www.cisa.gov/sites/default/files/publications/ict-scrm-task-force_smb-operationalizing-vendor-template_508.pdf

CompTIA Managing Your Business Resources for MSPs
Connect.CompTIA.org/resources/managing-your-business

CompTIA Technology Solution Resources for MSPs
Connect.CompTIA.org/resources/technology-solutions

CompTIA Blog
Connect.CompTIA.org