

A Guide to Starting a **Managed Service Provider** Business



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A guide to starting a Managed Service Provider (MSP) business

Starting a managed service provider business can be a thrilling, yet daunting, endeavor. Especially if you're someone who's new to this industry. That's why we've created this comprehensive guide to help you kick-start your MSP business. With this guide, you'll have the essential information and best practices to navigate the MSP landscape and achieve your goals.

We've distilled the key steps to help you launch and grow your MSP business successfully, from identifying your unique selling proposition (USP) and defining the right kind of offering to picking a pricing model, to setting up the necessary infrastructure, and more. So, are you ready to turn your vision into reality?



Conduct market research



Get the basics right

Before we delve into the market research aspect of starting an MSP business, it's important to have a few basics right.

What is an MSP?

A Managed Service Provider (MSP) is a professional IT service firm that businesses hire to handle their technology needs. The MSP provider ensures that your technology is functioning smoothly and efficiently, so that you can be worry-free and focus on your core business tasks.



What key services can you provide as an MSP business?

- 1. General IT support services** - Troubleshooting problems and assisting with any hardware or software issue that employees face.
- 2. Backup and disaster recovery** - Ensuring the safety and availability of data and systems in case of a disaster.
- 3. Network and communication** - Assisting with implementing network infrastructure and maintaining security measures to protect against cyber threats.
- 4. Cloud computing** - Providing cloud-based storage, computing, and data management solutions.
- 5. Remote monitoring and management** - Monitoring clients' networks and computers remotely and proactively.
- 6. Email and spam protection** - Protecting email systems against spam and viruses.
- 7. Compliance and regulatory support** - Providing support for regulatory compliance requirements.



What kind of businesses will hire you as a managed service provider?

A wide range of businesses, from small startups to large enterprises, can benefit from hiring a managed service provider. Small and medium-sized businesses (SMBs) in particular, that have limited internal IT resources, often choose to outsource their technology needs to an MSP for a more cost-effective and efficient solution. Meanwhile, large businesses rely on MSP to help them scale and keep up with the latest technology trends to stay ahead of the curve.



So, if you're looking for companies that could benefit from your MSP services, here's a quick rundown:

- | Businesses without an in-house IT team for technology maintenance, updates, and repairs.
- | Businesses that experience frequent service disruptions and high downtime.
- | Businesses that are willing to invest in a monthly fee for reliable IT services and operations.
- | Businesses that aren't meeting their goals due to insufficient IT support and services.

Do your research – know what you are getting into

Before you jump into this exciting, yet competitive industry, it's important to learn more about your potential market and help you determine your business strategy. It is also a proven fact that the managed service provider market is on the rise, there's no stopping.

“ There are over 150,000 MSP companies globally, according to the MSP Alliance, an international network of cloud and managed service providers. ”

Also, here are a few additional facts you should know about the MSP market.

Key facts to know about the MSP market

The global MSP market is growing rapidly and is expected to reach **\$731.08 billion** by **2030**.



North America leads the MSP market with over **30% market share**, while the APAC region is expected to show significant growth.

MSPs are offering more value-added services, such as **consulting, data analytics, advanced cybersecurity, and training**.



High-demand industries for MSPs include **healthcare, finance, manufacturing, and IT**, with the financial industry accounting for the largest market share of over **15%**.

Small and medium-sized businesses (SMBs) are driving the growth of MSPs as they increasingly turn to **MSPs for IT support and services**.



Major trends that are shaping the managed service market:

The adoption of cloud technology is on the rise - Today, a growing number of businesses are embracing cloud platforms to handle different business functions and meet their digital transformation goals. However, implementing a multi-cloud setup can be challenging without the proper infrastructure and resources. That's where Managed Service Providers come in. They help businesses to set up and use cloud technology by offering different pricing models, making it easier and more cost-effective for businesses to adopt the technology they need.

The rise of remote work - The growth of remote work has fueled an increase in the demand for managed IT services as more and more businesses continue to operate remotely after the pandemic. MSPs play a crucial role in supporting these remote teams by providing the necessary tools to tackle cyber threats and maintain overall business stability.

The focus on cybersecurity is growing - Cyberattacks are not going away, and as more businesses move online, it's becoming a big worry. Companies want to make sure their data and systems are safe, so they're paying more attention to security. MSPs offer important security tools like firewalls, antivirus, and intrusion detection to protect businesses from cyberattacks and keep them secure.

The growth of IoT (Internet of Things) - As the adoption of Internet of Things (IoT) devices continues to grow, the generation of data will also grow. With data being a valuable asset, businesses will seek the assistance of Managed Service Providers (MSPs) to manage, maintain, and monitor the data efficiently. However, implementing IoT applications is more complex than any traditional IT infrastructure. MSPs must be equipped to assist with every aspect of implementing an IoT network, including planning, procurement of hardware and software, building infrastructure, and ongoing network management.

The emergence of artificial intelligence and machine learning - Managed service providers (MSPs) are using AI and machine learning to enhance client support and identify and mitigate risks in real time. As more businesses move their workload to the cloud, AI can help MSPs monitor and manage networks across hybrid clouds. AI can function as an additional layer of monitoring and support that continually assesses these environments and alerts MSPs to potential issues.

Key steps to getting started with market research

So, as mentioned above, market research will give you valuable insights into your target market, competitors, demand for your services, and much more. This information will help you make informed decisions and set realistic goals for your MSP business.

Here are the key steps you should follow in conducting market research for you MSP business:



Identify your target market



Assess the competition



Survey your potential clients



Gather information on industry trends



Analyze your findings

Define your MSP offering and target market



Determine your MSP's unique value proposition

The MSP industry has experienced steady growth since the start of the pandemic, driven by the increasing adoption of cloud technology by businesses. This trend has created an opportunity for MSPs to offer their services and support organizations in their digital transformation journey. However, this growth has also led to a rise in competition in the MSP market, leading to a wider range of choices for businesses seeking an MSP to meet their needs.

So the question is when potential customers evaluate different MSPs, how will you make your business stand out from your competition?

“ *That's why it's essential to define your unique selling proposition (USP) and thereby identify your offer, target market, and pricing strategy accordingly.* ”

It's also crucial to distinguish between the services you can offer based on your expertise and those you can't and attract the right customers for your MSP business.

Here are a few things to keep in mind while defining your offer:

Assess your current strengths and expertise: Take a look at your team's skills and experience, and identify the areas where you excel. By doing this, you can determine the specific services you can offer and the types of customers you can serve best.

Analyze the current market demand: You don't want to enter a market that's already saturated. Stay on top of IT trends, such as selling security services, and how your SMB customers are allocating their budgets, so you develop service packages or bundles that are flexible, scalable, and easy to understand.

Consider vertical specializations: You can also pick a niche to differentiate your MSP business from competitors. By specializing in a particular area, you can become known as the go-to provider for that specific niche, which can help you attract more customers and charge premium rates for your services.

Bundle your MSP services for greater value

In this section, we will explore how bundling your MSP services can help you create more value for your customers and increase your revenue. But, how do you create the right bundles that appeal to your customers? And, what are the benefits of bundling? Let's dive in and find out.

Why do MSPs prefer bundling their services?

“ Bundling is a strategy where multiple services are combined into a single offering that is sold at a fixed price. ”

Your customer no longer has to pay individually for services they need. Bundling presents a simplified pricing structure. By bundling services together, MSPs can offer packages that are tailored to the specific needs of their customers at an all-inclusive price, making it easier for them to understand the budget for their IT expenses.

Here are some tips to help you bundle your MSP services:

Identify your most popular services: Today the biggest threat that customers face is cybersecurity threats, and that's why services like backup and disaster recovery, multi-factor authentication, single sign-on, and password management are in great demand. Start by identifying the most popular services that customers frequently request. These could be anything from remote monitoring to cloud hosting services.

Create bundled packages: Once you have identified your most popular services, create bundled packages that offer a combination of services at a discounted price. For example, you could create a package that includes backup and disaster recovery services, along with cloud hosting and managed IT support.

Offer tiered packages: You can also offer tiered packages that cater to different levels of service needs and budgets. It's one of the most favored pricing models among MSPs. This will allow you to attract a wider range of customers and create additional revenue streams. For instance, many MSPs use a three-tiered approach with gold, silver, and bronze packages that offer different levels of coverage. For example, the gold package could be all-inclusive 24/7 support with your services, silver might be 24/5 support, and bronze could be business-hours-only support.

Provide clear pricing and service level agreements: Make sure that your bundled packages have clear pricing and service level agreements (SLAs) to avoid confusion and ensure that customers know exactly what they are paying for.

How to define a target customer profile

To effectively promote and sell your MSP services, you need to identify your target market and ideal customer. This process would be much easier as by now you would've identified all the aspects of your offerings, such as the services you'd like to provide, the type of industry you want to serve, and the demographics of your ideal customers. Once you have a clear understanding of these factors, you can more easily tailor your marketing efforts to attract and engage the right customers.

“ Successful MSPs understand that targeting a specific customer profile is key to selling more effectively and maintaining cohesion within the organization and across teams. ”

It's crucial for your MSP business to focus on a specific customer profile to make the most out of your service operations, marketing, and sales. You don't want to waste your time and energy targeting any and all prospects. At first, it may seem like it's working, but eventually, you'll find it difficult to attract the right customers, and your service delivery may become less profitable. So, it's important to identify your target customer profile (TCP) early on. By doing so, you can tailor your offerings to attract customers who fit your defined TCP. This way, you can build and grow your business by continuously acquiring new customers that align with your target market.

Benefits of creating a target customer profile:

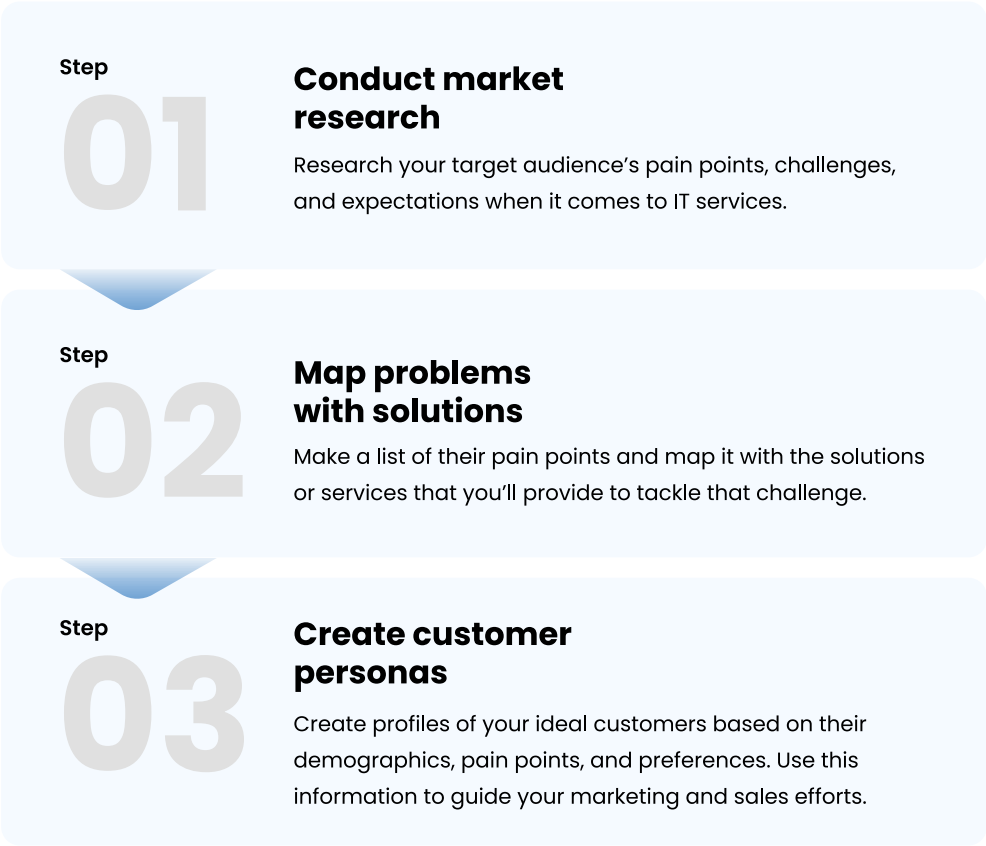
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Higher profitability: By focusing on a specific target market, you can tailor your services to meet their specific needs and preferences, which can lead to higher profitability. For example, let's say you have identified your target customer profile as a health insurance firm with 10-50 employees. By tailoring your services and marketing efforts to this group, you can position yourself as a specialized MSP for the Health insurance industry, which could lead to higher profit margins. Plus, you can offer additional solutions that they'd like that your competitors may not have, allowing you to charge premium rates for your services.

Faster sales cycle: Once you have a clear understanding of your target market, selling to them shouldn't be that hard. This can lead to a faster sales cycle, as you are able to connect with potential customers better and sell the value of your managed services.

Increased customer satisfaction and retention: Focusing on your target customer profile enables you to set standards for your services and provide a better customer experience. This is crucial in the service industry, where quality sets you apart from the competition. However, providing a consistent customer experience on time within the specified budget can be a challenging task, especially when you're expanding. MSPs can use different tools like Net Promoter Score (NPS) Program, Customer survey, and more, to analyze customer satisfaction.

Steps to follow to define the target audience



03

Determine your pricing strategy or model



Pricing is an important aspect of any business, and MSPs are no exception. Choosing the right pricing model can make a significant impact on your business's success. There are several pricing models that MSPs use today, and each has its own advantages and disadvantages. And, if you are going to determine your pricing model, it's first important to understand every pricing model out there. So let's explore them one by one.

Explore the common pricing models in the MSP world

All-you-can-eat pricing model

Under the "All You Can Eat" pricing model, MSPs provide clients with a comprehensive package that covers all necessary support and services for a fixed price within a defined period, such as a month or a year. Customers are free to consume as much of the service as they need within the designated time frame. Pricing is usually based on either the number of devices or the number of users requiring support.

Pros:

- ✔ Clients can budget more accurately, as there are no hidden fees or unexpected charges.

Cons:

- ✘ MSPs may underestimate the number of IT services and support requests, resulting in lower profit margins.
- ✘ Clients may overuse the services and support, resulting in reduced profitability for MSPs.

Per-device pricing model

This is one of the most popular pricing models among MSPs today. In this model, the MSPs charge their clients a fixed fee, often monthly, based on the number of devices they manage or support. This model is often used for businesses that have a large number of devices that need to be managed, such as those in the healthcare or manufacturing industries. This fee might vary based on each type of device that's covered under the contract.

Pros:

- ✔ It offers great flexibility to the customer as they can decide to add or remove the devices based on their requirement.

Cons:

- ✘ As clients expand their network or adopt a BYOD infrastructure, the billing structure can become more intricate, especially with the addition of new devices such as smartphones and tablets.
- ✘ Sometimes MSPs find it challenging to manage multiple devices for a single user, with many users having more than one device that requires support. Often, clients may not be willing to pay for managing all the devices the users use, for example, tablets.

Per-user pricing model

This pricing model is a straightforward approach where MSPs charge a fixed monthly fee based on the number of users who require IT support or services. This pricing model is suitable for businesses with a significant number of users who need IT support or services, especially in industries like professional services or education.

Pros:

- ✔ It is easy for clients to adjust their agreement if they add/remove employees or users from their network.

Cons:

- ✘ MSPs may face a fluctuating revenue stream depending on their clients' hiring plans and the addition of new users or devices without an increase in revenue.
- ✘ This model may not be ideal for businesses that have users who require varying levels of support or have different hardware and software needs.

Tiered pricing model

Also known as the "bundle" pricing model, it involves offering different levels of services at different price points based on the specific needs and budgets of clients. In other words, MSPs package different services together in a bundle and charge a fee for it. The prices of these bundles vary from one tier to another as the types of support and services provided transition from basic to premium.

Pros:

- ✓ Clients can choose the level of service that best fits their needs and budget, allowing for more flexibility and customization.
- ✓ MSPs can attract a wider range of clients with varying budgets and support needs.
- ✓ Clients can upgrade or downgrade their service level as their needs change over time.

Cons:

- ✗ Managing multiple service levels can be complex and time-consuming for MSPs.
- ✗ Clients may have difficulty choosing the right service level, leading to confusion or dissatisfaction.
- ✗ Clients may feel that they are paying for services they don't need or want in higher-priced tiers.

À la carte pricing model

The a la carte pricing model allows MSPs to offer specific services that address the unique needs of their clients. It is kinda the opposite of the 'All-you-can-eat' pricing model. Here, the customers have the freedom to choose only the services they require and create a personalized package of managed IT services. They also have the option to select multiple offerings to address their diverse IT needs.

Pros:

- ✓ Customers can choose only the services they need, which can be cost-effective for smaller businesses or those with a limited budget.

Cons:

- ✗ Managing multiple services and pricing plans can be complex and time-consuming for MSPs.

Monitoring pricing model

The monitoring-only pricing model is a type of MSP pricing model that focuses on providing proactive monitoring and alerting services to clients. Under this model, MSPs offer continuous monitoring of client systems and devices to identify potential issues and prevent them from becoming larger problems. This model can be a good fit for clients who have in-house IT staff but lack the resources to provide continuous monitoring services.

Pros:

- ✓ This model provides clients with greater control over their IT costs by allowing them to pay only for the monitoring services they need.

Cons:

- ✗ MSPs may find it challenging to generate significant revenue under this model, as the services provided are relatively narrow in scope.

Find the right pricing model for your MSP business

Choosing the right pricing model for your MSP business can be challenging as it depends on several factors, such as the needs and budgets of your target clients, the services you offer, and the level of competition in your market. While some MSPs prefer to stick to a single pricing model, others use a combination of models to meet different client needs. It's important to strike the right balance between profitability and competitiveness when setting your prices.

Regardless of the pricing model you choose, there are several key factors to consider. Let's look at them.

Operational cost: You need to take into account all operational costs, such as software licenses, employee salaries, and more, to determine the minimum prices you need to charge to make a profit.

Competition: Another important factor that you should look at is how your competitors have priced their services. This would give you an idea of how you would like to price your offer and differentiate your services from others.

Scalability: Whatever pricing model you choose, it should be scalable as your business grows. Consider how easy or difficult it will be to add new customers and services without making significant changes to your pricing structure.

Value proposition: While most MSPs provide similar services, what sets them apart is their value proposition and pricing model. To differentiate yourself, focus on providing high value to keep your customers satisfied and coming back for more.

Register your MSP business



Starting an MSP business can be an exciting journey, but before you dive in, there are a few important things you need to get in order. You'll want to establish a strong foundation for your business to ensure quality service delivery. In this section, we'll walk you through the key steps to establishing your MSP business, including choosing the right business structure, registering your business, creating a business identity, and setting up your operations.

Different business structures available

There are different legal structures for businesses to choose from based on their work, such as LLC, Corporation, Sole Proprietorship, or Partnership, based on their business needs and goals.

A Limited Liability Company or LLC is most popular among small businesses because it provides protection for business owners while maintaining the flexibility of a partnership. One of the benefits of an LLC is pass-through taxation, which means that the business is not taxed separately and instead, the profits and losses are reported on the owners' personal tax returns. This can make tax filing easier and more streamlined for small business owners.

A Corporation is another legal structure option for businesses. It is a separate legal entity from its owners and provides limited liability protection to them. However, the profits and losses of a corporation are taxed separately from the owner's personal income, which may lead to double taxation. Despite this potential disadvantage, corporations have the advantage of attracting investors by issuing shares of stock, which can be used to raise capital for the business.

Once you have chosen the appropriate legal structure for your MSP business, you need to register your business and ensure it's legitimate and that you comply with different laws.

Foundational steps to establishing your MSP business

01

Establish business identity:

- a. Choose a legal structure suitable for your business.
- b. Register the business with the relevant government agencies.
- c. Establish a business name and obtain a domain name for the business.
- d. Create a logo and set up a website for the business
- e. Obtain a phone number for the business.

02

Setting up business operations:

- a. Set up a bank account for the business.
- b. Find office space or establish a home office for the business.
- c. Develop a marketing strategy and establish partnerships.
- d. Find and hire necessary business professionals, such as accountants and attorneys.

03

Develop Service Level Agreements (SLAs):

- a. Develop service offerings based on the target market and industry trends.
- b. Determine the pricing model for services.
- c. Develop SLAs that outline the services provided, response times, and other key metrics to ensure that clients understand the level of service they can expect.



Get the necessary certifications



You may be wondering whether obtaining certifications is worth the investment of time and money. The answer is a resounding yes!

“ As an MSP, having the right certifications can help you stand out in a crowded market, giving potential clients confidence in your ability to deliver quality services. ”

Choosing the right IT certification

When it comes to certifications for MSPs, choosing the right one is the key. The right certifications can open up a lot of new business opportunities. You don't want to waste time and money pursuing a certification that won't benefit your business. That's why it's important to consider how it aligns with the services you already offer, how much cost and time would be involved, and the reputation of the certifying organization. Moreover, obtaining certifications can grant you access to privileged resources and information from vendors such as Google Cloud, Microsoft Azure, AWS, and VMware.

Below, we'll explore the different certifications that are available for MSPs and discuss how they can benefit your business.

Top IT certifications for MSPs

AWS

- AWS Certified Solutions Architect
- AWS Certified Developer
- AWS Certified DevOps Engineer

Azure

- Azure Developer Associate
- Azure Solutions Architect Expert
- Azure DevOps Engineer Expert
- Azure Administrator Associate Certification

Cisco

- Certified Cisco Network Professional (CCNP)

Google

- Cloud Professional Cloud Developer
- Cloud Professional Cloud Architect
- Cloud Professional Cloud DevOps Engineer

VMWare

- Data center virtualization certification

CompTIA's

- Cloud+and Security+certification

(ISC)2

- Certified Information Systems Security Professional (CISSP)

ISACA

- Certified Information Security Manager (CISM)

Set up the business infrastructure



You need a combination of hardware, software, and communication tools to effectively manage your client systems and networks. To get started, there are a few default software options that you'll need, such as Remote Monitoring and management (RMM) software and Professional Services Automation (PSA) software you'll need to get started and work efficiently.

Since this is a significant investment, it's best to carefully evaluate and compare different tools available in each category and pick the one that meets all your expectations in terms of cost, features, and benefits.

Here are some of the essential tools you will need:

MSP software list:

Remote Monitoring and Management (RMM) software: This is a crucial tool for MSPs as it allows you to remotely monitor and manage client systems and networks. It provides real-time information on system performance, security, and updates, enabling you to proactively identify and resolve issues.




Professional Services Automation (PSA) software: PSA software helps you manage and automate various business processes, including ticketing, invoicing, and project management.

Help desk software: As a service business, your top priority should be to keep your customers satisfied. That's where help desk software comes in. It provides a centralized platform for managing customer support requests, enabling you to respond quickly and efficiently to customer inquiries and issues. With features like multi-channel support and automation, help desk software can improve response times, streamline support operations, and boost customer satisfaction.






Backup and disaster recovery solution: If you are an MSP providing backup and recovery solutions, then this software is a must-have. It not only helps you manage backups of your own systems but helps you protect your client's data in the event of a security breach, hardware failure, or natural disaster.

Communication and collaboration software: Get tools such as email, instant messaging, and video conferencing to collaborate with team members and to stay in touch with clients, especially when working remotely.

MSP security software list:

-  Anti-virus and anti-malware software
-  Firewall
-  Email security software

MSP hardware list:

-  Computers and laptops
-  Servers and storage devices
-  Network equipment (routers, switches, and firewalls to manage clients' networks)
-  Printers
-  Phone systems

Hire a team for your new business



When starting as an MSP, having a large team may not be feasible, but having a skilled team is crucial for success. In the beginning, a small team may suffice for servicing the initial clientele. However, as your business expands, it will be necessary to hire more team members to ensure that the company can continue to deliver quality services to clients.

In the beginning, a small team may suffice for servicing the initial clientele. However, as your business expands, it will be necessary to hire more team members to ensure that the company can continue to deliver quality services to clients.

“ But, the question here is, who should you hire first? Where could you use some additional help within your newly-started business? ”

When deciding on the first hire for your new business, it's important to first have a hiring strategy in place that aligns with the business goals and priorities. You need to identify the gaps you want to fill as well as what your immediate business needs are. For example, you don't want to hire a salesperson if you are sure you have enough prospects in your pipeline via referrals and your network.

The three key MSP positions to launch your business

Technical support specialist:

While it's true that bringing in new clients is an important priority for a business owner, it's also important to ensure that the clients that you've just onboarded are satisfied and receiving the technical support they need. That's where a technical support specialist comes in. This role can handle day-to-day technical support tasks, allowing the business owner to focus on strategic planning and business growth.

Operations manager:

An operations manager can help you with some of the everyday work such as invoicing, scheduling appointments with clients, developing SLAs, and more. They can help you manage all the back office work and streamline day-to-day operations. Additionally, they can also help manage projects and budgets and establish policies and procedures that can improve overall efficiency.

Field specialist:

Their primary role typically involves providing on-site technical support to clients. If you are offering specialized services that require on-site support, such as network infrastructure installation or hardware repair, then a field specialist may be necessary from the start. Besides, having someone on the ground interacting with clients will help you establish a better relationship with the client.

08

Launch your MSP business



Now that you have done all the research and decided what services you will offer, it's time to launch your MSP business and get into the game. It's the most exciting and important step that requires careful planning and execution. In this section, we will discuss the key steps you need to take to successfully launch your MSP business. These steps include creating a marketing plan, identifying marketing channels, and promoting your services to potential clients.

Create a marketing plan

At this stage, your primary focus would be to generate leads and establish a sales pipeline. As you work on this, it's also important to have your website up and running.

“ Ensure that your website messaging is tailored to resonate with your target audience and effectively communicates the value of your services. ”

This will enable you to connect with leads from various marketing channels who visit your website and encourage them to sign up for a free consultation.

After creating your website, here are a few things to work on

Create ad-hoc content:

Develop a plan for creating and sharing relevant and informative content, such as webinars, blogs on the latest MSP trends, and guides.

Identify marketing channels:

You can use a mix of digital and traditional marketing channels to reach your target audience. Some effective channels for promoting MSP services include social media, email marketing, search engine optimization (SEO), pay-per-click (PPC) advertising, trade shows, and word-of-mouth referrals.

Determine marketing budget

Determine a budget for all your marketing activities, and determine how much you can spend on each channel.

Promote your MSP Business and get your first client

- Utilize MSP networks and communities
- Leverage social media channels
- Ask for referrals
- Attend trade shows and events
- Offer free consultations
- Partner with complimentary business vendors

It's not a guarantee that all these channels will give you leads, but at least one of them would work, and you'll have a decent number of potential clients to kick-start your business.

Onboard your first MSP client



Once you've successfully generated interest and gained potential clients, the next step is to convert them and begin the onboarding process.

“ For managed service providers, onboarding is a crucial step in establishing a strong relationship with clients and setting the tone for future interactions. ”

While each client may have unique requirements, having a well-structured onboarding process can help you efficiently onboard your clients and provide them with a seamless experience. In this last section of the guide, we'll discuss the key components of a successful onboarding process for MSPs, including technical assessments, documentation, service agreements, and ongoing support.

01

Conduct an introductory meeting

- Through this meeting, gather client details and understand their business, goals, and IT infrastructure.
- Discuss the scope of services and understand what their expectations are.
- Introduce your entire IT team to the client as they'll be working with them closely.

02

Do a technical assessment

- Conduct a technical assessment of the client's IT infrastructure to understand their current state and identify areas of improvement.
- Collect information about their server and workstation specifications, network, account credentials for all systems and equipment, existing documentation, applications, and security.

03

Document client information

- Create documentation of the client's IT infrastructure, including network diagrams, system configurations, and software licenses.
- Ensure that all documentation is organized and accessible to the MSP team.

04

Sign service agreement

- Draft a service level agreement (SLA) that outlines the scope of services, service level agreements, pricing, and payment terms.
- Review and finalize the service agreement with the client.

05 Facilitate provisioning

- Install the necessary software, configure systems, and establish communication channels with the client.
- Provide the client with a detailed onboarding plan and timeline.

06 Train your client's employees

- Provide training to the client's employees on the use of MSP services and tools.
- Ensure that the client's employees understand the importance of IT security and best practices.

07 Provide ongoing support

- Set up the help desk software and provide access to the customer portal for ongoing support requests.
- Set up a monitoring and reporting system to proactively identify and resolve issues.

08 Conduct periodic reviews

- Schedule periodic reviews with the client to assess their IT infrastructure and identify areas for improvement.
- Brief them about the work you've done and the progress made toward their goals with reports and presentations.
- Discuss new services and solutions that may benefit the client.

By following this checklist, MSPs can ensure that their clients have a smooth onboarding process and are set up for long-term success.

We hope this guide has been helpful in providing you with the necessary information to launch a successful MSP business and establish yourself as a trusted provider of IT services. If you have questions or would like to jump on a call for anything MSP, please feel free to [write to us](#). The SuperOps.ai team would be happy to help. Good luck on your journey as a managed service provider!



Kickstart your MSP business with [SuperOps.ai](#)—the truly unified, future-ready, PSA-RMM platform for fast-growing MSPs.

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