



**16**

# QUESTIONS

you need to ask when  
evaluating a new IT Provider

**IT**   
**Umbrella Group**

## 01 Why should we work with your firm?

Start with the low hanging fruit: let's hear their pitch. Why should your company, specifically, work with their firm? Be on the lookout for canned or generic answers they say to everyone. If they answer with specifics about your business or industry, that's a step in the right direction. It's a good sign if they're doing their homework prior to making the sale.

## 02 Why shouldn't we work with your firm?

We've only been asked this question once, but it sure put us on our toes! It's a variation of the classic, "what is your greatest weakness?" If they say nothing, then you may want to question the transparency of this organization. No company is perfect. Is there any reason you should NOT work with them? If they give an honest answer it should count for them, not against them, unless it's truly concerning.

## 03 What are the biggest challenges to a strong partnership?

This is for both parties. Hear what challenges could arise in the partnership. For instance, some clients want things immediately, but are not always willing to wait. Getting honest feedback will start the partnership off on the right foot.

## 04 How does the escalation process work? What if I am not satisfied with the response/resolution time of a particular service ticket or project?

This is critical. There are going to be times where the Help Desk may not escalate to higher tiers quick enough. Prioritization often comes from the IT firm. However, what if you want to supersede this decision? What does the escalation process look like? Do you have an Account Manager that is there to help more than just sell you on something?

## 05 What end user training do you provide (other than cybersecurity awareness training)?

Every IT Provider provides end user cybersecurity training. Are there other resources they offer to benefit your organization? This could be a massive value add without needing to pay extra. For instance, we have multiple tech tip suggestions for end users that enable them to better use their Microsoft products and other productivity training. This is rare and should be a question you ask the provider.



## **06** What reports are sent to the management team, and what is the cadence?

You should receive monthly reports. This is non-negotiable. While it is a partnership and you do trust your provider to be monitoring and managing your systems, getting reports will help you keep a gauge on what is (and maybe isn't) getting done. If they do not have an answer to this question, or they do not provide any reports, this is a red flag that they are not a mature organization.

## **07** What does the onboarding experience look like with your firm?

They should have a defined onboarding process. Ideally, this should be a checklist that covers every relevant aspect of the technology at your business. For instance, a specific timeline on how long it should take; What happens day one, week one, month one, etc. If they have no process for this, it's another red flag. If it's a "we'll get to it soon" or "you're second in line" I would be weary. It's okay if you're not first in line, but it's not okay if there are not defined expectations they can set on a start and end date.

## **08** What do you believe your differentiators are compared to other IT providers?

Customer service is not really a differentiator. Simply ask them what makes them different, and pay attention to how they respond. Listen carefully to see if their differentiators actually help your business, or if they're just rehashing sales speak. If their differentiators provide real value, then they should weigh into the final decision.



## 09 Do you use in-house or contracted resources for services?

Most IT Providers use in house technicians and support. However, it's good to make sure. If they are outsourcing a lot of their support, it's important to know. It's not a deal breaker, but ask more questions. Where are these resources? Are they in different countries? If so, what cybersecurity practices are they putting in place to make sure your systems are protected from their overseas resources?

## 10 What would you need for a successful transition to your service (specific credentials, expectations from the champion, staff list and security level)?

No need to get technical here, but this is considered a Runbook. Understanding what they'll need BEFORE signing up will make the transition easier, so get a defined list from your current provider to provide the winning IT provider.

## 11 How often do you meet with your customers for future planning?

Make sure you set the expectation early that you expect ongoing planning. Your technology is very important. Don't let your provider "push off" meetings, and make sure you don't push off meetings either. As mentioned earlier in this guide, both parties need to be engaged for a successful partnership.

## 12 We were just hit with ransomware, what are the next steps? What would the Disaster Recovery process look like?

The vast majority of IT providers do a good job of protecting your technology. They put many protective layers in place to keep the bad guys out. However, the most mature have a defined response. Make sure to ask this question so you know if there will be a plan in place to get your business running, and know how quickly that can happen if an attack does occur. No IT provider in the world can guarantee you won't be hit with a cyber-attack. However, they can prepare an effective plan to get you back up very quickly. If they can't answer this question confidently, on to the next one.



**13** **A new team members starts at your organization. They receive a ticket from our organization. What did their onboarding look like to ensure they are ready and able to effectively manage that request?**

As I'm sure you've noticed, many of these questions are to identify if they are a process driven organization. It will also help you to avoid the pitfalls many businesses fall into when choosing the wrong provider. These are handpicked questions. We ask our clients, "what were you struggling with before working with our company?" They explain what they were struggling with and that's exactly what we address in our own service.

**14** **How do you monitor customer satisfaction and quality assurance on an ongoing basis?**

Is there a process in place to ensure your end users are satisfied and staying productive? If they have a clear process of continued customer satisfaction and improvement, that's a good sign. If not, you may want to ding them on this question.

**15** **How often do you raise prices and when did you last raise prices for customers?**

Most likely the contract will have verbiage stating how much the provider can raise prices. This question can help you identify if they are aggressive with raising prices. Not saying this should be a deal breaker, but you do not want to have to restart this process every couple of years due to being priced out of their service.

**16** **We have a new employee starting, what does that process look like for your team? What should we expect and what would expect from us?**

The lack of a defined onboarding and offboarding process will cause major headaches! This is a check box question. Do they have a process in place or not?

