Transitioning from Break/Fix to Managed Services: Minimum Requirements Checklist

ninja
RMM

Here's what you'll need in place before you dive in:

Access requirements

- Standardized set of offerings, including the hardware and software you provide and support

- Fixed-fee pricing structure

- Service level agreement (SLA), reviewed by a lawyer and including a clear definition of what is and isn't billable work

- Definition of your "ideal" managed services client (buyer persona)

- Your mission, goals, and key differentiators (the answer to, "why you?")

- Initial network assessment methodology

- Sufficient appropriate liability and business insurance

- Comprehensive security audit

- Actively tested disaster recovery procedures

- Testing environment to conduct pre-deployment testing of major updates, hot-fixes, etc.

- Loaner or spare machines on hand

- Strong 3rd party vendor relationships and ability to escalate vendor support for clients

- Standardized processes for working with support issues (classifying, escalating, and reporting incidents)

- Staffing and expertise for managing the following tools

Technology requirements - tools you'll need

- Remote monitoring and management (RMM) software for delivering your services (monitoring, proactive maintenance, etc.)

- Professional services automation (PSA) software for managing clients and your business

- Helpdesk/ticketing software (if not included in PSA)

- Remote access software

- Accounting/billing software

- Documentation software (to increase efficiency and reduce training time)

Technology requirements - tools you'll manage for clients

- Managed endpoint protection (antivirus/antimalware)

- Managed email security (antispam / filtering)

- Managed backup / storage solutions

- Managed firewall(s)