

MSP Evaluation Worksheet

Score and Compare Managed Service Providers Side by Side

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This worksheet accompanies our guide "How to Pick an MSP in NYC: 10 Questions to Ask." Use it to score and compare MSP candidates on the questions that actually matter -- not just price.

How to use this worksheet:

1. List up to 3 MSP candidates in the columns on the right.
2. Ask each MSP all 10 core questions (plus bonus questions if relevant).
3. Score each answer 1-5 using the rubric below.
4. Note red flags in the dedicated section.
5. Total the scores. The numbers rarely lie.

SCORING RUBRIC

- 5 = Excellent:** Specific, documented, verifiable answer with evidence. This is what a best-in-class MSP sounds like.
- 4 = Good:** Clear answer with some specifics. Credible and confident, minor gaps.
- 3 = Acceptable:** Adequate answer but vague in places. Not a dealbreaker, but not reassuring either.
- 2 = Weak:** Evasive, generic, or clearly rehearsed. Lacks specifics. Proceed with caution.
- 1 = Fail:** Could not answer, deflected, or gave a response that raised more questions than it answered.

MSP CANDIDATES

	MSP A	MSP B	MSP C
Company name	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact person	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone	<input type="text"/>	<input type="text"/>	<input type="text"/>
Monthly quote	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contract term	<input type="text"/>	<input type="text"/>	<input type="text"/>

CORE QUESTIONS -- SCORE EACH MSP 1-5

1. What is your average response time, measured how?

Look for: a specific number from a real ticketing system (e.g., "14-minute average from Concur"). Red flag: "very fast" or "industry-leading" without data.

Score: /5

Notes:

2. Who answers the phone at 2 AM on a Saturday?

Look for: a specific name, number, and escalation path. Red flag: generic 1-800 after-hours number routed overseas.

Score: /5

Notes:

3. What is included in your flat-rate price, line by line?

Look for: a complete SOW with included/excluded project-priced categories. Red flag: "limited use" subject to fair use language.

Score: /5

Notes: _____

4. What is your average ticket aging, broken down by priority?

Look for: specific metrics for the past 90 days by P1/P2/P3/P4. Red flag: they don't track this or can't produce it.

Score: /5

Notes: _____

5. How do you handle escalation when tier-1 cannot solve a problem?

Look for: named senior engineers, documented paths, SLA at each tier. Red flag: "we figure it out."

Score: /5

Notes: _____

6. Who is on your team? Where are they located?

Look for: a team page, in-house vs. outsourced staff, certification list. Red flag: evasion about offshore helpdesk.

Score: /5

Notes: _____

7. What is your security baseline for managed clients?

Look for: EDR, SIEM, MFA, backup stack names, secure memory and INCLUCED (not recommended). Red flag: "we recommend it" vs. "it's included."

Score: /5

Notes: _____

8. Show me your last incident postmortem (redacted).

Look for: a documented, blameless postmortem shared willingly. Red flag: "we don't have incidents" or refusal to share.

Score: /5

Notes: _____

9. What is your process for offboarding a client?

Look for: documented runbook, credential handover, reasonable timing. Red flag: penalties, withheld credentials, "we'd never let that happen."

Score: /5

Notes: _____

10. Can I talk to three current clients in my industry and size?

Look for: three references in your industry, your size, willing to talk. Red flag: references are difficult to produce.

Score: /5

Notes: _____

BONUS QUESTIONS

These are worth asking but harder to score objectively. Note the answers and use them as tiebreakers.

- What is your average client tenure?
- What is your annual client churn rate?
- What is your engineer-to-client ratio?
- How are tier-3 escalations handled?
- What is your stance on hardware markups? (pass-through at cost or marked up?)
- Do you have a non-technical account manager for larger engagements?

RED FLAGS -- CHECK ANY THAT APPLY

Any one of these is a reason to proceed with extreme caution or walk away.

Vague pricing ("it depends" with no follow-up or written estimate)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lock-in contract longer than 12 months with no out clause	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No 30-day out clause in the service agreement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cannot produce a current SOC 2, cyber insurance certificate, or security documentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High-pressure sales tactics, "today only" pricing, or aggressive discounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unwilling to start with a small engagement to prove fit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cannot or will not provide three client references in your industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evasive about where helpdesk staff are located	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Security stack is "recommended" but not included in the monthly price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No documented escalation path or named senior engineers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SCORING SUMMARY

	MSP A	MSP B	MSP C
Total score (out of 50)	<hr/>	<hr/>	<hr/>
Number of red flags	<hr/>	<hr/>	<hr/>
Monthly quoted price	<hr/>	<hr/>	<hr/>
Price per endpoint per month	<hr/>	<hr/>	<hr/>

Decision:

- Proceed with: _____
- Request additional information from: _____
- Decline all candidates and restart search

Decision rationale: _____

DO YOU ACTUALLY NEED A FULL MSP?

If you already have an in-house IT person or small team and are looking at MSPs because that person is overwhelmed, the right answer may be co-managed IT -- not fully-managed. Co-managed keeps your in-house person and adds depth, 24/7 SOC monitoring, after-hours coverage, and tier-3 escalation behind them. Same security stack, lower monthly cost, dramatically reduces burnout risk.

NOTES

This worksheet is provided as a vendor evaluation resource by Sage Solutions LLC. It does not constitute a recommendation for or against any specific provider. Scores are subjective and should be considered alongside references, contract terms, and your specific requirements. Version 1.0 | May 2026

