

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



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)