

# MSP Sales Process Guide and Checklist





Do you feel like you're missing out on deals you should be able to close?

Are you struggling to follow up with leads in a timely manner while running your day-to-day business?

Are your sales efforts unorganized and constantly put on the back burner?

We get it. Sales is hard. Many MSPs like you struggle with it for all kinds of reasons. But successful managed services providers — those with 70% and higher close rates and 10-day sales cycles — all have one thing in common. They have a clearly defined sales process, and they stick to it.

This guide will help you establish your own winning sales process, and includes cheat sheets you can use to keep that process visible, measurable, and repeatable. Before we get into particulars, let's first establish the core elements every MSP deal is built on.

# 4 things you need to close a deal



No matter what the situation is, these are the four things you always need. Why?

**Q: Where do nearly ALL sales objections stem from?**

**A: Trying to get #4 before properly establishing #2 and #3.**

If you clarify your prospect’s pain and budget effectively you don’t get objections when you move to close the deal. By identifying these as the key factors that actually build up to a “yes,” you can break your sales efforts down into distinct, manageable steps. Better yet, you can map each call, meeting, and touchpoint to the goal of moving a prospect from one stage to the next. In other words, you can start creating a defined and repeatable process.

## So, what does an IT services provider sales process actually look like in action?

Your sales process should be built around accomplishing these four core things in a standardized manner that essentially looks the same from prospect to prospect.

### Example:

1 Qualification	Introductory call
2 Pain discovery	1st prospect meeting
3 Budget	2nd meeting to share results of pain discovery call and discuss prospect’s budget
4 Decision	3rd prospect meeting to share quote

Every interaction you have with a prospect during your sales process needs to be tightly focused on actively completing each step and moving through to the next. Otherwise, you'll either find yourself wasting your time or leaving unnecessary openings for the prospect to have uncertainty and doubt and shop elsewhere. Speaking of time...

## How long should this take?

The number of steps and length of time will obviously vary. It can depend a lot on the types of prospects you're dealing with, number of decision makers in their organization, red tape, etc. For example: Selling to a mom and pop shop is going to be much faster than selling to a medium-sized healthcare provider or large enterprise.

For many SMB clients, **the magic number you should shoot for is completing the entire sales cycle, from first touch to quote, in 7-10 days.** How do you get those five core steps completed in that amount of time?



# Intro Call Cheat Sheet

**Goal: Qualification–Rule out prospect or book first in-person or virtual meeting with with prospect stakeholders.**

## Initial qualifying questions [inbound]

- To whom am I speaking and what is your title and role in the business?
- What is your responsibility in terms of information technology needs?
- Are you responsible for recommendation and purchase decisions for services to manage your IT needs? Are there other stakeholders we should include in a discovery call?
- Do you specialize in any specific vertical markets such as retail, finance, healthcare, etc.?
- Where are you located geographically?

## Initial qualifying questions [outbound]

- Do you have a physical location where the majority of the computers are located?
- Are you currently working with a managed service provider?
- Are you under a formal service agreement or pay as you go?
  - If under a formal agreement when does it expire/renew?
  - What does it cover?
- How many users do you have and what is the breakdown between full-time, part-time, in-office, remote, and hybrid?
- How many endpoints do you have including servers, desktops, laptops, and mobile devices?
- How long have you been in business?
- Can you provide the approximate age of your workstations and servers?
- Do you have a backup and recovery solution? Is it on-prem or SaaS? Are you confident that it covers all your use cases?
- Have you had any security incidents in the past year?
- What IT-related problems do you currently have that are reducing employee productivity and IT efficiency?
  - In particular, is it a problem that another IT service provider has failed to solve?
- Why are you starting to look for help with your IT operations?
- Are you confident in your current patching solution's ability to protect your remote and hybrid endpoints?
- Do you have a mobile device management solution that handles Android and Apple devices?
- Would you like to consolidate multiple endpoint management tools into a single platform?

**The intro call step is not complete until you've checked the appropriate box:**

Stakeholder meeting  
scheduled

Prospect disqualified

Prospect put into  
nurture / revisit  
in \_\_\_ months

# Stakeholder Meeting Cheat Sheet

Goal: Pain Discovery—Identify and current non-technical business issues in the prospect’s own words.

## Questions to ask if the prospect doesn’t currently have an MSP

- If your business suffered 2 - 4 days of system downtime, how detrimental would that be?
- Do you have a data backup and recovery solution? If so, how confident are you in its ability to restore your systems after a cyber incident or system failure?
- How does your team respond to cyber threats or attacks?
- Do you have time to undertake strategic projects that move your business forward or is your team too busy trying to stay ahead of day-to-day tasks?
- Do you need help managing third-party vendors and software applications?

## Questions to ask if the prospect has a current MSP

- Do you think your current MSP understands your business?
- Does your current MSP offer 24/7/365 monitoring?
- Does your current MSP offer backup services or mobile device management?
- What’s the response time from your MSP when you log a support incident?
- Does your MSP have a formal process for escalations during a cybercrime incident?
- Do you receive regular communications from your MSP regarding hardware or software updates or new technologies that may be valuable to your business?
- Are you satisfied with the monthly billing or is it a point of stress?
- Does your MSP offer any leadership or direction for your company’s IT operations?
- Does your MSP help you deal with third-party vendors?

STEAL THIS LINE TO GATHER PAIN WITHOUT RUNNING DOWN THE COMPETITION:

**“What could your current provider be doing better or differently that would have kept you from calling me?”**

The pain discovery step is not complete until you’ve checked the appropriate box:

Technical evaluation scheduled (if appropriate, can also pre-schedule results presentation and proposal resentation, too)

Prospect disqualified

Prospect put into nurture / revisit in \_\_\_ months

# Technical Evaluation Assessment Checklist

This checklist walks you through developing a baseline assessment of a Client’s current IT environment. It includes three general categories related to IT management with sub-categories in each sub-category has four possible states: Not Applicable, At Risk, Needs Review, Aligned.

At the end of the assessment review the “At Risk” and “Needs Review” categories to determine the Client’s most at risk or potentially at risk (“Needs Review”) areas of endpoint/IT management and determine how your managed services can best serve the Client.

CLIENT NAME:

DATE:

## 1. Hardware/Software

### 1a. Servers

Total # of servers

NOT APPLICABLE	There are no servers.
AT RISK	Some/many servers are EOL or have expired warranties.
NEEDS REVIEW	Some/many servers are approaching EOL or the end of warranty.
ALIGNED	Most servers are not approaching EOL or are well within warranty period.

### 1b. Workstations

Total # of workstations

NOT APPLICABLE	There are no workstations.
AT RISK	Some/many workstations are EOL or have expired warranties.
NEEDS REVIEW	Some/many workstations are approaching EOL or the end of warranty.
ALIGNED	Most workstations are not approaching EOL or are well within warranty period.

### 1c. Operating Systems

NOT APPLICABLE	List OS’s running on the client network and version numbers.
AT RISK	List OS versions that are no longer vendor supported.
NEEDS REVIEW	List OS versions that are nearing EOL.
ALIGNED	All OS versions are current and vendor supported.

## 1d. UTM Internet Security Appliance

AT RISK	Current device is a router only and lacks monitoring and up-to-date security features.
NEEDS REVIEW	Firewall is managed and up-to-date, but nearing the end of its lifespan.
NEEDS REVIEW	Current firewall is not configured to block unwanted content.
ALIGNED	Supportable UTM firewall is included and managed.

## 1e. Switches

NOT APPLICABLE	Client is not using physical switches in their IT environment.
AT RISK	Switches have passed EOL. Firmware updates and security patches can no longer be made.
AT RISK	Switches are more than 5 years old and not managed or monitored in the cloud. Performance suffers and risk of failure and downtime increases.
NEEDS REVIEW	Switches are adequately managed and VLANs are deployed. Lack of cloud visibility negatively impacts ability to monitor and troubleshoot.
ALIGNED	Switches are next-gen cloud-managed. Regular lifecycle maintenance is performed.

## 1f. Wireless Technologies

NOT APPLICABLE	The organization does not utilize wireless technologies in their environment and have no business case to introduce it.
AT RISK	Wireless hardware has passed EOL. Firmware updates and security patches cannot be made even if vulnerabilities are discovered.
AT RISK	Wireless connectivity points are added without proper procedures for tracking and management.
ALIGNED	Wireless connectivity is separated into VLANs, managed and allow for guest access separate from corporate data networks.

## 1g. Power Management

NOT APPLICABLE	The Client runs all of their workloads in the cloud, and power interruption is not a concern.
AT RISK	The Client is not using any uninterruptable power supply for any of its servers and workstations.
AT RISK	The Client utilizes an uninterruptable power supply for some of its servers and workstations.
ALIGNED	The Client utilizes uninterruptable powers supplies for all essential servers and workstations.

## 2. Continuity of Operations

### 2a. Backup and Disaster Recovery

AT RISK	No backup processes are in place. Backups are not currently running.
AT RISK	Backups require manual intervention to run or manage physical media.
NEEDS REVIEW	Backups are performed to the cloud i.e., AWS, Google Drive, Dropbox, Microsoft 365 or other cloud service.
ALIGNED	Cloud backup and disaster recovery solution protects on-prem and remote devices, encrypts backups and provides easy restore options.

### 2b. Backup of Cloud Services

AT RISK	Third-party backups recommended by Microsoft and Google have not been implemented.
NEEDS REVIEW	Client understands the risk of not backing up Microsoft and Google Workspace data and is willing to accept the loss of data stored in third-party cloud environments.
ALIGNED	Cloud backups are in place and include backups for Microsoft and Google Workspace data.

### 2c. Business Continuity Plan

NOT APPLICABLE	Client is unaware of a Business Continuity Plan for their organization.
AT RISK	Client relies on vendors to help when a disaster strikes and guide them through recovery steps.
NEEDS REVIEW	Basic continuity planning exists but is not tested or reviewed regularly.
ALIGNED	Organization has continuity plans in place for a variety of potential disaster scenarios. Plans are reviewed, tested, and updated at least annually or more often if necessary.

### 2d. Endpoint Security Software

AT RISK	Anti-virus software is installed manually without clear visibility into which devices are protected and which are not.
NEEDS REVIEW	Anti-virus software is installed and managed centrally through highly manual processes.
NEEDS REVIEW	Anti-virus software is managed using a server-based console and all endpoints are up-to-date.
ALIGNED	Endpoint protection with endpoint detection and response is installed on the network replacing or supplementing anti-virus software.

## 2e. Patch Management Policy

<b>AT RISK</b>	No defined process exists for regularly deploying OS and application updates. Patches are installed manually and there is no automated process for checking patch status or accuracy.
<b>NEEDS REVIEW</b>	Some client devices can't be patched due to vendor restriction. Client is taking additional steps to add protection but full, automated remediation isn't possible.
<b>NEEDS REVIEW</b>	Client has a defined process for regularly deploying OS and applications updates. While patches are audited for successful deployment and required remediation, the process still requires manual intervention.
<b>ALIGNED</b>	Client has a defined process for regularly deploying OS and applications updates. Automation helps audit patches for successful deployment and implements required remediation.

## 2f. Hosted Email

<b>AT RISK</b>	Organization uses consumer-grade email with minimal security features.
<b>NEEDS REVIEW</b>	Organization uses email hosted by Microsoft 365 but security standards are not aligned with best practices leaving security gaps.
<b>NEEDS REVIEW</b>	Organization uses Google Workspace but company imposed security standards are not aligned with recommended best practices leaving security gaps.
<b>ALIGNED</b>	Email is outsourced to a third-party hosted Exchange provider such as Microsoft 365, and aligned with recommended best practices leaving no security gaps.

## 2g. Email Protection and Filtering

<b>AT RISK</b>	No email anti-spam and/or virus filter in use. The email client provides filtering.
<b>NEEDS REVIEW</b>	Google Workspace provides minimal filtering which may be insufficient.
<b>NEEDS REVIEW</b>	Microsoft 365 provides minimal filtering which may be inefficient.
<b>NEEDS REVIEW</b>	A third-party anti-spam and virus filter is integrated into the hosted Exchange provider.
<b>ALIGNED</b>	Advanced central email program is deployed and protecting the email environment.

## 2h. Email Archiving

NOT APPLICABLE	Client has sensitive data and/or special reporting requirements and email archiving is not in place.
NEEDS REVIEW	Email archiving is not in place, but Client accepts the risk of lost or incomplete data searches in the event of a request.
ALIGNED	Email archiving is in place to protect sensitive data from loss and/or to simplify the search for data in the event of a request.
ALIGNED	There is no sensitive information in email. Email is deleted regularly to limit exposure in the event of a breach.

## 2i. Line of Business Application Support

AT RISK	Client depends on out-of-date software that is not under vendor support. This may lead to stability issues, downtime, and/or security breaches.
ALIGNED	Client's LoB applications are modern, under vendor support, and should be included in lifecycle management planning.

## 2j. Redundant Internet

NEEDS REVIEW	Client is aware that redundant solutions exist, but accepts the possibility of minimal downtime as an acceptable risk with minimal negative impact on the business.
ALIGNED	Client runs two ISP circuits in tandem.
ALIGNED	Client has implemented wireless backup.

## 2k. Infrastructure Capacity and Scalability

NOT APPLICABLE	Client is not planning for expansion at this time.
AT RISK	Local resources are at capacity.
NEEDS REVIEW	Local resources are limited making scaling the business expensive or otherwise difficult.
ALIGNED	Organization is planning to or has moved to the cloud. This will enable the company to scale as it grows without unnecessary expense or delays.

## 2l. Storage

AT RISK	Primary data storage is less than 20% free. Low free space can cause issues with backup and maintenance tasks. This can negatively impact the company's ability to grow and scale the business.
NEEDS REVIEW	There is no shared storage and/or files reside on local workstations.
ALIGNED	Primary data storage is onsite and offers sufficient room for expansion and growth.
ALIGNED	Primary data storage is in the cloud and is scalable to meet current and future business needs.

## 2m. Remote Access

NOT APPLICABLE	Client is unsure of remote access requirements. More information is needed.
AT RISK	VPN is required to work remotely. Unmanaged devices are being used for remote access.
NEEDS REVIEW	VPN is required to work remotely. Company supplied equipment is used for remote access.
ALIGNED	Organization's infrastructure is built for mobility first, secure remote access by hosting all critical components in the cloud.

## 3. Strategic

### 3a. Asset Inventory

AT RISK	Asset inventory is not being performed or is being performed unsystematically.
NEEDS REVIEW	Asset inventory is manual and time consuming.
ALIGNED	Asset inventory is mostly automated and included in the IT Service Agreement.

### 3b. Network Documentation

AT RISK	Network documentation is minimal or non-existent, making it difficult to support the Client's environment.
NEEDS REVIEW	Because all service hours are billable, in an attempt to control costs, network documentation lacks details.
NEEDS REVIEW	MSP or other service provider creates the network documentation, but on-site IT techs do not properly document subsequent changes resulting in a decline in the accuracy of documentation over time.
NEEDS REVIEW	Network documentation is incomplete and needs to be updated.
ALIGNED	Network documentation is created by the MSP or other service provider and available on request or shared with the Client as necessary.

### 3c. Network Documentation

NOT APPLICABLE	Client is unaware of a controlled access or least privilege policy for their organization. More information is needed to assess.
AT RISK	Client has no policy in place to limit access rights for users to the bare minimum permissions they need to perform their work.
ALIGNED	Client has a defined policy in place to limit access rights for users to the bare minimum permissions they need to perform their work.

### 3d. Directory Services

AT RISK	No central source of authentication is in place, creating unnecessary risk caused by lack of accountability and an inability to deploy appropriate and effective security policies.
NEEDS REVIEW	Users, groups, and permissions are managed for free in Azure, which limits group policy capabilities.
ALIGNED	Users, groups, and permissions are authenticated against a robust cloud-based authentication system.
ALIGNED	Users, groups, and permissions are authenticated against an on-site domain controller.

### 3e. Dark Web Monitoring

AT RISK	No dark web monitoring is in place.
ALIGNED	The dark web is being monitored for employee credentials and a process is in place to provide additional training if/when credentials are breached.

### 3f. IT Support Services

AT RISK	All IT support is reactive and billable by the hour, making it impossible to adequately budget for IT support costs.
NEEDS REVIEW	IT Support Agreement includes unlimited remote support but onsite support is billable separately and therefore difficult to budget for adequately.
NEEDS REVIEW	IT Support Agreement includes basic automated tasks but when human intervention is required it's billable separately and therefore difficult to budget for adequately.
ALIGNED	IT Support Agreement includes unlimited remote and onsite support. Moves, adds, changes, and projects are billable separately and introduce a degree of uncertainty for budgeting.

### 3g. Media Disposal Policy & Procedure

<b>AT RISK</b>	No policies and procedures for secure media disposal are in place.
<b>NEEDS REVIEW</b>	Client's current media disposal policies and procedures are ineffective, exposing the organization to significant risk of data exposure or data breaches.
<b>ALIGNED</b>	Client's current media disposal policies and procedures are in place and followed every time hardware is procured and retired from use in the organization.

### 3h. Technology Budgeting

<b>AT RISK</b>	Technology budgeting is not performed regularly, making lifecycle management a difficult or impossible task.
<b>NEEDS REVIEW</b>	Technology budgeting is performed but is somewhat ad hoc without clear long term planning in place.
<b>ALIGNED</b>	The Client has a formal budget in place for all IT products and services.

### 3i. Virtual Networks (VLANs)

<b>AT RISK</b>	The Client network does not have VLANs deployed increasing the chances of cyber attacks.
<b>NEEDS REVIEW</b>	A minimal number of VLANs have been deployed with access rules between them to provide an additional security layer. However further segmentation is recommended for better compliance.
<b>ALIGNED</b>	An appropriate number of VLANs have been deployed with access rules between them to provide an additional security layer and aid in achieving compliance.

### 3j. MSP Consulting Services

<b>AT RISK</b>	Client does not have a Managed Service Provider engagement. Strategic tasks like technology planning, budgeting, and alignment are not conducted regularly.
<b>NEEDS REVIEW</b>	Managed Services consulting is included in the Client's current service agreement but the Client is not taking full advantage of them.
<b>ALIGNED</b>	Managed Services consulting is included in the Client's current service agreement and strategic business review meetings are scheduled quarterly, semi-annually, or annually.

# Results Presentation Cheat Sheet

Goal: Budget–Commit to ballpark figure, schedule final proposal meeting to close the deal.

Why they contacted us	Challenges / Pain points	Priorities
Outcomes of inaction	Costs associated with above	Value/costs associated with above

## Be prepared to

- Repeat prospect pain points and have them affirm in real time
- Provide the prospect with an estimated cost based on businesses of similar size
- Provide a detailed example of a similar client and what outcomes they had by signing on with your MSP
- Walk away or recommend other options, if the prospect is uncomfortable with the estimated cost figure for managed services

STEAL THIS LINE TO GET YOUR BUDGET WITH BRACKETING:

“Mr. Prospect, I have worked with several clients with similar concerns to the ones you have told me about, and in those situations they spent between \$\$\$\$ and \$\$\$\$ in IT services to resolve those issues and provide adequate IT support. If I came to you with a price in that range, can we do business together?”

The budget step is not complete until you’ve checked the appropriate boxes:

Budget estimate confirmed

Proposal meeting scheduled

# Proposal Presentation Cheat Sheet

Goal: Decision–Close the deal.

Top needs	Business value/costs associated with those needs	Agreed-upon price range

## Checklist / Presentation Tips

- Come to the prospect with a detailed proposal outlining services and tech offered
  - This must include billing terms and timeline on the managed service agreement
- Be prepared to take questions or adjust the offering as needed
- **Obtain a firm “yes” or “no” from the client**
- If the deal looks as if it will fall through, push a special last minute offer to help keep the potential new client engaged. Ensure this special offer is in line with your margins.
- Once the offer scope is finalized, close the deal and prepare to onboard a new client!

**The decision step is not complete until:**

You have firm “yes”  
or “no”

# Summary

## A consistent, documented sales process:

- Helps you get organized as a business. A documented sales process allows a business to quickly onboard new sales talent in a professional, strictly outlined process that is aligned with your brand identity and company tone.
- Provides accountability when it comes to making agreements with clients and formalizing the new prospects onboarding process.
- Develops a baseline, regularly recording data and metrics like time on the phone with a prospect, amount of calls until conversion, and repeated pain points by prospects can make future sales cadences even stronger.
  - For example: You discover you typically fully convert one out of every ten prospects; that allows you to budget your sales and marketing spend accordingly.
- Identifies bottlenecks and conversion points you need to improve on as a team or a business. In many cases, you might hear pain points that your company does not have a solution for or billing terms are too complex and abstract for some customers to understand. Either way, it is necessary.

In order to attain consistent growth as an MSP it is necessary to develop a formalized, repeatable sales process that pinpoints a prospect's pain points, attaches solutions to your offering to solve business problems and deliver that to the decision makers to build consensus leading to a closed deal.

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