

60 MUST-ASK QUESTIONS

Before Selecting a Managed IT Provider

IT SERVICES

BUYER'S CHECKLIST

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PULSE TECHNOLOGY

Proudly serving businesses across Illinois, Northwest Indiana, and Southeast Wisconsin

A Managed IT provider should be able to explain clearly what they offer, how they deliver support, how they protect your systems and data, and what you can expect from the relationship.

This checklist gives you focused questions to ask when comparing providers. Their answers can help you understand how each company works and whether its services fit your organization.

Together, they cover six important areas:

6 QUESTIONING TOPICS

SECTION 01



Company Experience and Services

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Support and Service Delivery

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Cybersecurity, Compliance, and Business Continuity

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Communication, Pricing, and Partnership

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SECTION 06



Business Needs and Expectations

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HOW TO USE THIS CHECKLIST

1. **Share it before the meeting**
   Send the questions ahead so vendors come prepared.
2. **Compare vendors**
   Create your own customized buyer's checklist.
3. **Watch for red flags**
   Know what to avoid and what to look for in a strong provider.

THE BIG PICTURE

74%

of U.S. tech and IT employers say they struggle to find the skilled talent they need.

Source: Experis Tech Talent Outlook, Q3 2026

SECTION 01

Company Experience and Services

Assess the provider's experience, capabilities, and fit.

	QUESTIONS	VENDOR A	B	C
01	How long have you provided Managed IT Services?	☐	☐	☐
02	What types and sizes of organizations do you typically support?	☐	☐	☐
03	Do you have experience working with organizations in our industry?	☐	☐	☐
04	Can you provide references from clients with needs like ours?	☐	☐	☐
05	What services are included in your Managed IT offering?	☐	☐	☐
06	Do you assess our technology before recommending services?	☐	☐	☐
07	Can your services adapt as our needs change?	☐	☐	☐
08	What does your onboarding process involve?	☐	☐	☐
09	Do you offer both fully Managed and Co-managed IT Services?	☐	☐	☐
10	What is your client retention rate?	☐	☐	☐

Red Flag
Vague answers or a standard package that ignores your needs.

Pro Tip
Ask how the provider helped a similar organization through a technology challenge or major change.

Look For
Relevant experience, strong client retention, well-defined services, and tailored recommendations.

WHY IT MATTERS

73%

of organizations with up to 2,000 employees already work with a Managed Services Provider.

Source: Barracuda MSP Customer Insight Report

SECTION 02

Support and Service Delivery

Review how the provider handles support, escalation, and urgent issues.

	QUESTIONS	VENDOR A	B	C
11	What are your standard support hours?	☐	☐	☐
12	Do you provide 24/7 monitoring and emergency support?	☐	☐	☐
13	Is after-hours support provided by your own team or a third party?	☐	☐	☐
14	How can our users contact the service desk?	☐	☐	☐
15	How do you prioritize and assign support tickets?	☐	☐	☐
16	What are your average response and resolution times?	☐	☐	☐
17	How are unresolved issues escalated?	☐	☐	☐
18	How do you communicate during outages or urgent issues?	☐	☐	☐
19	Who coordinates with vendors on multi-system issues?	☐	☐	☐
20	How do you identify and address recurring issues?	☐	☐	☐

Red Flag
No clear escalation process, response commitments, or vendor coordination.

Pro Tip
Ask how the provider would handle a support issue from request to resolution.

Look For
Defined service levels, support options, escalation steps, and ownership through resolution.

WHY IT MATTERS

48%

of organizations rely on their Managed Services Provider for round-the-clock security coverage.

Source: Barracuda MSP Customer Insight Report

SECTION 03

Cybersecurity, Compliance, and Business Continuity



Examine how the provider protects your business and supports recovery.

	QUESTIONS	VENDOR A	B	C
21	Do you conduct a risk assessment before recommending cybersecurity services?	☐	☐	☐
22	Which cybersecurity protections are included in your Managed IT offering?	☐	☐	☐
23	How do you protect our users, devices, applications, and networks?	☐	☐	☐
24	How do you manage software updates, patches, and unsupported technology?	☐	☐	☐
25	How do you detect and respond to threats?	☐	☐	☐
26	What security awareness training do you provide for our people?	☐	☐	☐
27	How do you help us meet industry-specific or regulatory requirements?	☐	☐	☐
28	Can you provide documentation for cyber insurance or audits?	☐	☐	☐
29	What backup and recovery services do you provide?	☐	☐	☐
30	How often are backups and recovery procedures tested?	☐	☐	☐
31	What is your role during a cyberattack or major outage?	☐	☐	☐
32	How do you assess security risks from third-party vendors?	☐	☐	☐

Red Flag
The provider cannot explain its security protections, backup testing, or threat response.

Pro Tip
Ask how the provider secures its own systems and access to client environments.

Look For
Layered security, defined response roles, tested recovery, and compliance expertise.

WHY IT MATTERS

96%

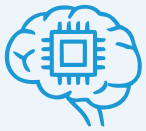
of ransomware victims were small and midsize businesses.

Source: Verizon 2026 Data Breach Investigations Report

SECTION 04

Technology Planning and AI

See how the provider approaches planning, innovation, and responsible AI use.



	QUESTIONS	VENDOR	A	B	C
33	How do you align technology recommendations with our goals?		☐	☐	☐
34	How do you measure the value of technology investments?		☐	☐	☐
35	Do you create and maintain a technology roadmap for each client?		☐	☐	☐
36	How often will you review our systems, risks, contracts, and technology needs?		☐	☐	☐
37	How do you evaluate new technologies before recommending them to clients?		☐	☐	☐
38	How do you help clients decide where AI or automation adds practical value?		☐	☐	☐
39	Can you help us create policies for safe, appropriate use of generative AI?		☐	☐	☐
40	How do you identify unauthorized AI tools and other unapproved technology?		☐	☐	☐
41	Where do you use AI in your own support, service, or security processes?		☐	☐	☐
42	How do you keep our data from being exposed or used for AI model training?		☐	☐	☐

Red Flag
Recommending AI without considering business value, data, security, costs, or human review.

Pro Tip
Ask how the provider helped a client adopt AI responsibly.

Look For
Practical planning, transparent AI use, data safeguards, and relevant recommendations.

WHY IT MATTERS

67%

of users accessed AI services through non-corporate accounts on company devices.

Source: Verizon 2026 Data Breach Investigations Report

SECTION 05

Communication, Pricing, and Partnership

Clarify communication, costs, contract terms, and account ownership.



	QUESTIONS	VENDOR A	B	C
43	Who will be our primary contact?	☐	☐	☐
44	How often will we receive service reviews and recommendations?	☐	☐	☐
45	What information will be included in our reports?	☐	☐	☐
46	Where are your support and technical teams located?	☐	☐	☐
47	What certifications and qualifications does your team maintain?	☐	☐	☐
48	How is your service priced, and what is included in the base fee?	☐	☐	☐
49	What services, projects, or circumstances could result in additional charges?	☐	☐	☐
50	Who owns our licenses, documentation, accounts, configurations, and data?	☐	☐	☐
51	What is the contract length, renewal, and termination terms?	☐	☐	☐
52	What happens to our data, accounts, and tools if we leave?	☐	☐	☐

Red Flag
Unclear pricing, limited reporting, restrictive renewals, or nontransferable accounts.

Pro Tip
Ask what is included, what costs extra, and how offboarding works.

Look For
Transparent pricing, regular updates, account ownership, fair terms, and a clear exit process.

WHY IT MATTERS

45%

of organizations would switch providers if their MSP couldn't show it can deliver 24/7 security support.

Source: Barracuda MSP Customer Insight Report

SECTION 06

Business Needs and Expectations

Look for a provider that shapes its services around how your organization actually works.



	QUESTIONS	VENDOR A	B	C
53	How do you learn how our teams use technology?	☐	☐	☐
54	Who would you want to speak with before recommending services?	☐	☐	☐
55	How would you support the different technology needs across our teams?	☐	☐	☐
56	Can your services account for multiple locations and remote or hybrid staff?	☐	☐	☐
57	How do you plan around busy periods and critical deadlines?	☐	☐	☐
58	How would you help our staff adjust to new systems or technology changes?	☐	☐	☐
59	What do you expect from us as a client?	☐	☐	☐
60	How would you identify manual steps or workarounds our staff rely on?	☐	☐	☐
61	How do you support people with different levels of technical comfort?	☐	☐	☐
62	What happens if your service is not meeting our expectations?	☐	☐	☐

Red Flag
The provider focuses on devices and software without asking how your organization works.

Pro Tip
Ask how the provider learns about a new client's business and who it includes in those conversations.

Look For
Interest in how your people work, what you rely on, and what you expect from the relationship.

WHY IT MATTERS

51%

of remote-capable U.S. employees work a hybrid schedule.

Source: Gallup

We Don't Mind the Hard Questions



If an IT provider can't clearly explain what you're signing up for, that's a real warning sign. The Pulse Technology team will take the time to answer every question on this list, line by line.

We'll explain how our support is delivered, what is included, how your systems and data are protected, and what you can expect from our relationship.

Let's Talk.

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PULSE TECHNOLOGY

About Pulse Technology

We are an award-winning, family-owned business with decades of dedication to the industry. We are a complete office technology partner providing Managed IT and products to help your business run smoother and keep you ahead of the curve.

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