

MSP Business Systems Self Assessment Worksheet

Sea-Level Operations, LLC



- Step 1: Rate yourself on how well each operational task is being performed in your organization using the following scale.
 Step 2: Pick 5 operational tasks that you would like to focus on over the next 30 days. Rank them 1 to 5 (1 being the highest priority).
 Step 3: Pick 10 additional operational tasks that you would like to attack over the next 90 days. Rank them 1 to 10.
 Step 4: Designate who the responsible party is in your organization that we should work with to develop this operational process.

Rating	Description	Rating
1	Does Not Exist	1
2	Doing This Ad Hoc	2
3	Undocumented But Attempting to Perform	3
4	Partially Documented and Performing	4
5	Fully Documented Repeatable Process	5



- Phase 1: Sea-Level Training on Templates and Concepts
 Phase 2: Template Customization to your Business
 Phase 3: Staff Training on the New Policies and Processes
 Phase 4: Implementation of the new Operational Task
 Phase 5: Follow-up / Inspect what you Expect

Company Name:	
Your Name:	
Date:	

Category	Order	Department	Operational Focus	Rating	Next 30	Next 90	Jan	Feb	Notes	Responsible Party
Get your PSA Configured Correctly	1A	PSA (CW/AutoTask)	Business Unit Mapping							Service Manager
	1B	PSA (CW/AutoTask)	Service/Project Board Configuration							Service Manager
	1C	PSA (CW/AutoTask)	Workflow Rules Setup (Initial Basic Rules)							Service Manager
	1D	PSA (CW/AutoTask)	Agreement Types							Accounting
	1E	Administration	Setup Agreements with Hard Costs on the Additions Tab							Accounting
	1F	Administration	Billing Rates (Onsite Minimum, After Hours, etc.)							Owner
	1G	PSA (CW/AutoTask)	Work Roles and Work Types							Service Manager
	1H	Administration	Travel Billing Policy							Service Manager
	1I	PSA (CW/AutoTask)	Use of Client Portal							Service Manager
	1J	PSA (CW/AutoTask)	Member Security Role Configuration							Owner
	1K	PSA (CW/AutoTask)	Recurring Service Templates							Service Manager
	1L	PSA (CW/AutoTask)	SLA Initial Configuration							Service Manager
	1M	Outside Sales	MSP Contract Language Review							Owner
	1N	Outside Sales	MSP Agreement Pricing							Owner
Get Your Policies and Procedures Documented	1O	Administration	Create Company-wide location for Documents created in process							Owner
	2A	PSA (CW/AutoTask)	Expense Report Procedures							Accounting
	2B	Delivery Process	Ticket Triage Processes							Service Manager
	2C	Delivery Process	Ticket Dispatch Processes							Service Manager
	2D	Delivery Process	Engineer Time Entry Procedure and Policy Documentation							Service Manager
	2E	Delivery Process	After Hours Policy / On-Call Rotation							Service Manager
Establish Measurable KPIs	2F	Delivery Process	Ticket Closing Procedures							Service Manager
	2G	Administration	Timesheet Approval Processes							Service Manager
	3A	Administration	Measuring Agreement Profitability							Service Manager
	3B	PSA (CW/AutoTask)	Quantity/Age of Open Tickets							Service Manager
	3C	PSA (CW/AutoTask)	SLA Measurement (Advanced Workflow Rules & ConnectSMART)							Service Manager
	3D	Administration	Establish KPIs for Measuring Service Efficiency / Utilization							Service Manager
Serviciz: Team HR	3E	Delivery Process	Review How NOC KPIs are Displayed for the Engineers							Service Manager
	4A	Employee Management	Engineer Compensation Plan							Owner
	4B	Employee Management	Service Manager Compensation Plan							Owner
	4C	Administration	Organizational Chart vs. Accountability Chart							Owner
	4D	Employee Management	Employee Job Descriptions							Owner
	4E	Employee Management	PTO/Vacation Calendar							Accounting
Leverage Your Tools	4F	Administration	Payroll Procedures (Salary vs. Hourly and how Timesheets are used)							Accounting
	5A	Delivery Process	Effectiveness of RMM Tool							Service Manager
	5B	Internal IT	Client Password Management							Service Manager
	5C	Delivery Process	Client Documentation Process (Minimum Documentation)							Service Manager
	5D	Delivery Process	Client Backup Monitoring Processes							Service Manager
	5E	Delivery Process	Client Patch Management Processes							Service Manager
	5F	Delivery Process	Firewall / Security Management Processes							Service Manager
	5G	Delivery Process	Desktop/Endpoint Management Scripts (Leveraging RMM tool)							Service Manager
	5H	Delivery Process	Standardization of BDR/Servers/Workstations Across Clients (HaaS)							Service Manager
	5I	Internal IT	Internal Network Infrastructure							Service Manager
5J	Internal IT	Internal Disaster Recovery Plan							Service Manager	

Category	Order	Department	Operational Focus	Rating	Next 30	Next 90	Jan	Feb	Notes	Responsible Party
Get Your Accounting Systems in Order	6A	Administration	PSA General Ledger Mapping to QuickBooks							Accounting
	6B	Administration	Cash vs. Accrual Accounting for Down Payment and Agreement Billing							Accounting
	6C	Outside Sales	Proposal Integration (Quosal/QuoteWerks)							Sales Manager
	6D	PSA (CW/AutoTask)	Billing Products from PSA							Sales Manager
	6E	Administration	Disputed Invoice / Credit Memo Process							Accounting
	6F	Administration	Hourly Time Billing Procedures							Accounting
	6G	Administration	Recurring Agreement Billing Procedures							Accounting
	6H	PSA (CW/AutoTask)	RMM Integration w/CW - Tickets, Configurations and Agreement Quantities							Service Manager
	6I	Delivery Process	Agreement Billing True-Up Process							Service Manager
	6J	Administration	Finance Reporting in the Service Leadership Index Format							Accounting
Client Facing Systems	6K	Vendor Management	Procurement Coordination with Dispatch and Accounting							Sales Manager
	6L	Administration	Accounts Receivable Processes							Accounting
	7A	Outside Sales	Pre-Sales Client Assessment (Red Flags/Minimum System Standards)							Service Manager
	7B	Delivery Process	New Client Onboarding (Tracks, Welcome Kit, etc.)							Service Manager
	7C	Delivery Process	Tracking of Renewals / Warranty Expirations							Service Manager
	7D	Delivery Process	Project Management Processes							Service Manager
	7E	Delivery Process	Develop the Account Management Role (Sales to Existing Clients)							Service Manager
	7F	Delivery Process	Client Touch Plan							Service Manager
	7G	Delivery Process	Client Satisfaction Quality Control Processes							Service Manager
	7H	Delivery Process	Quarterly Business Review Process (VCIO role)							Service Manager
Get Ready to Grow!	7I	Delivery Process	Problem Management Process for Tough Client Issues							Service Manager
	7J	Internal IT	Regulatory Compliance (HIPAA, etc.)							Service Manager
	8A	Employee Management	Hiring Processes							Owner
	8B	Employee Management	New Employee Onboarding Process							Owner
	8C	Employee Management	Admin Compensation Plan							Owner
	8D	Employee Management	Employee Annual Training Program							Service Manager
	8E	Internal IT	ITIL Understanding / Training							Service Manager
	8F	Employee Management	Staffing Levels and Skills (Skill Report in CW)							Service Manager
	8G	Employee Management	Employee Goal Setting / One on One Time							Owner
	8Z	Employee Management	Employee Off-Boarding							Owner
Marketing	9A	Marketing & PR	Company Mission, Vision, Values							Owner
	9B	PSA (CW/AutoTask)	Marketing Manager							Sales Manager
	9C	Marketing & PR	MSP Branding							Owner
	9D	Marketing & PR	Marketing Plan							Owner
	9E	Marketing & PR	Newsletter							Owner
	9F	Marketing & PR	Website							Owner
	9G	Vendor Management	Vendor Management / Maintaining Authorizations							Owner
	9H	Vendor Management	MDF Funds from Vendors							Sales Manager
	9I	Marketing & PR	Lunch and Learn Topics and Calendar							Owner
	9J	Marketing & PR	Annual Open House / Technology Expo							Owner
Develop your Outside Sales Strategy	10A	Employee Management	Sales Compensation Plan							Owner
	10B	Outside Sales	Managing Opportunities / Sales Funnel							Sales Manager
	10C	Outside Sales	Sales Process for Engineers Participating in Scoping							Service Manager
	10D	Outside Sales	Create a Standard Demo of How We Deliver Service/Use Tools							Service Manager
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