# Questions to ask a potential I.T. Service Provider

Small businesses often rely on their information technology but cannot afford to hire an I.T. professional in a full time position.  Fortunately, many firms provide consulting services and outsourcing of I.T.  In fact, there are so many firms now providing such services, that it is helpful to have a list of questions to ask.

1. Does the potential I.T. Service Provider provide the following:

   a. A support help-desk for 8am to 5pm calls

   b. A 24-hour support hotline for emergencies

   c. Backup management

      i. Periodic full backups (Quarterly or monthly)

         *Periodic backups decrease recovery time and reduce backup integrity risk.*

      ii. Daily incremental backups

         *Daily incremental backups reduce the risk of losing recent data.*

      iii. Offsite backups

         *Offsite backups allow recovery even if your entire building is lost.*

      iv. Secure/encrypted backups

         *Encrypted backups reduce the risk that confidential company data is compromised.*

   d. Data Protection management

      i. Anti-virus implementation and management

         *Anti-virus software needs to be regularly updated to protect against the latest viruses.*

      ii. Spam protection

      iii. Firewall installation and management

   e. Hardware Support

      i. For server(s)

      ii. For desktop and laptop Computers

      iii. For peripherals such as keyboards and mice

    iv.   For handheld computers such as PocketPC devices and Blackberries

    v.   For printers

    vi.   For networks

f.   Software Support

    i.   For operating systems such as Windows XP

    ii.   For server operating systems such as Small Business Server or Windows 2003

    iii.   For server software such as Microsoft Exchange (E-mail)

    iv.   For desktop software such as Microsoft Office and Quickbooks

    v.   For handheld software such as Microsoft PocketPC and PalmOS

g.   Network Support

    i.   Internet access configuration and support

    ii.   Network routers and firewalls

    iii.   Wireless networks

    iv.   Network cabling

    v.   Switches, hubs, and other network devices

h.   Periodic assessments of the environment to determine that all is still secure and efficient

*As your environment changes over time due to new employees, new computers, and new software, the needs of your I.T. environment may change, and holes in security or backup processes may develop.*

i.   Business Planning – proactive planning to determine how the business can improve using I.T.

*When an I.T. partner understands your business, they may be able to recommend I.T. solutions that can increase your productivity.*

j.   Help with licensing compliance and choosing the best licensing strategies

k.   Planning and budgeting for future I.T. expenses (replacing servers, computers, etc.)

l.   Liability insurance

*Even the best I.T. partners can make mistakes. If their mistake causes a significant loss to your business, liability insurance may help provide a reconciliation.*

2. How many full time I.T. employees are on staff?

   *Does the I.T. partner have enough I.T. staff to reliably provide support?*

3. Would specific I.T. staff be assigned to your business?

   *Your organization usually benefits from having the same I.T. technicians provide service. Technicians that are familiar with your environment, staff, and processes.*

4. Are you allowed to tour their facility?

   *This is another indicator of how successful and organized they are.*

5. How long have they been in business?

   *Businesses with more experience should generally provide better service.*

6. How many clients do they have?

   *Will they be able to handle your additional demands with their existing employee base?*

7. Are their current clients comparable in size and I.T. needs to your business?

   *Are they familiar with the needs of an organization like yours?*

8. What relevant technical certifications do their employees have?

   *Basically you are attempting to determine if their employees are good at what they do.*

You may want to try to determine how organized their processes are for tracking and resolving your problems. To do so, consider asking some of the following questions:

9. Please walk through what would happen if you called in to report an unexpected message on your computer. Would you talk to a human? Would you be transferred to another support person?

   *Note if they would they record the call, problem, and resolution. Ideally your I.T. partner will keep a record of all your interactions and problems reported with them. This not only helps keep them from losing track of unresolved issues, but can speed problem resolution in the future by researching the history of similar problem reports.*

10. How would they handle a problem with Microsoft Excel that their techs could not resolve using online public knowledge bases?

*Note if they have priority arrangement with vendors such as Microsoft. If their staff does not have the resources to solve the problem, do they have plans in place for bringing in someone that can resolve the problem? Do they have partnerships in place with other companies that can provide expertise in specific areas?*

11. Do they use a remote logon product for support?

*Remote support products are usually beneficial to both your organization and to your I.T. partner. They allow quicker responses to problems and more options for performing routine maintenance.*

    a. If so, what product do they use?

    b. Would you need to purchase the product?

        i. If yes, how much does it cost?

    c. How secure is the product?

12. What type of logging and tracking is done for the times the I.T. support firm does work for you?

*A history of incidents can help identify more fundamental problems. Also, it is important that you can get a list of that information in case you switch I.T. partners in the future.*

    a. Is there a log of each machine access?

    b. Can the I.T. support firm access all the computers without first contacting you?

    c. Can the I.T. support firm access your computers without you being aware of it?

        i. If yes, do you want this?

13. Do they have a product for tracking issues reported?

    a. If yes, what product?

    b. Can you see or update the status of those issues online?

    c. Can you get a history of those issues per workstation/device?

14. How would they back up the data for you?

*An I.T. partner that is performing similar services for other companies should have well organized processes in place that they can also apply to your environment.*

15. How would they manage and track your hardware and software inventory?

*They could use software to identify all the software installed on computers on your network, but any software should also be double-checked initially by a person.*

16. How would they manage and track your software licenses?

17. Would your business need to buy any software installed by the I.T. partner to be used for inventory, backup, or remote access?

    *Some I.T. partners may provide offsite backups via the Internet as part of their service; others may work with you to implement processes through another technology provider.*

18. Will they provide a trial period before signing any long-term contracts?

    *Perhaps the best way to determine if they are right for you, and if they can provide the services they claim to provide, is to use them for a month or two without requiring a long-term commitment.*

19. How do they bill for support instances?

    a. What constitutes a single support incident?

        i. Do they bill per hour, or per incident?

        ii. How do they bill for extended problems like:

            1. A problem that occurs and is "fixed", but re-occurs a few days later

            2. A problem that a tech begins working on at 4pm, but has to come back in and finish the next day?

    *Many I.T. service providers will offer a set number of hours for a monthly fee, along with a per hour charge for support beyond the set number of hours. Are you held responsible when it takes their technician 10 or 20 hours to solve a problem?*

    *Some will charge per incident. Are you charged twice if the same incident occurs repeatedly?*