

# MSP Solutions Buyer's Guide





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# Choosing the Right Solutions For Your Core Services

Today's MSPs can choose from a broad range of solutions, all built specifically for the purpose of managing multiple customers with functionality, productivity, and profitability in mind. These tools can make the work of an MSP far easier – but only after the right set of solutions has been chosen to meet the needs of both the customer and the MSP. As such there is a significant market demand to identify which types of solutions MSPs should be including as part of their core offerings (that is, those services every customer will use), as well as which functionalities in each solution are going to provide the greatest benefit.

And that's the crux of where your focus should be – the types of solutions and functionalities within that will be core to your service offerings and, therefore, your business. It's that core that I'm going to be focusing on in this buyer's guide.

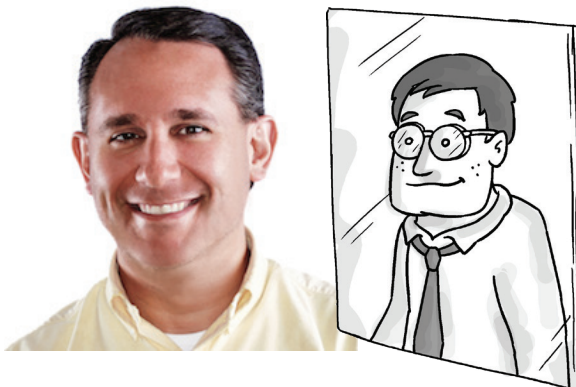
My goal here is to help you understand the types of solutions needed for those services you should include as part of your core offering, as well as to help you determine which specific solutions you should shortlist. I've narrowed the buyer's guide down to five key types of solutions you should consider.

- Remote Monitoring & Management
- Remote Access
- Backup & Recovery
- Endpoint Protection
- Professional Services Automation

In nearly every type of solution, you should be watchful for the use of automation and artificial intelligence (AI); these specific technologies are what will directly improve the quality, speed, predictability, and profitability of the services these solutions will assist with, which include Managed IT, Managed Cybersecurity, Incident Response, and Backup & Recovery.

So, unlike our traditional Buyer's Guide, where we zero in on a single solution and break down the various sets of buying criteria functionality within that solution, instead I'm going to provide some high-level guidance on how to identify solutions that will best meet your core service offering needs.

- Nick Cavalancia, Microsoft MVP, and former MSP owner



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# How to Use This Guide

# How to Use This Buyer's Guide

Conversational Geek Buyer's Guides help you assess and choose the right solution for your organization. We do this by breaking the guide into two parts.

## Selection Criteria

We first provide you with a number of important buying criteria to consider. Each criteria section focuses on a particular set of features and capabilities available by solutions today. Those capabilities are then broken down into two distinct categories:

- **Required:** The capabilities listed in this criteria category are those that are fundamental for purchase consideration. Any solution you consider on your shortlist should have the capabilities listed at a minimum.
- **Optional:** The capabilities listed in this criteria category are features that will enhance your use of the solution but aren't part of the core required capabilities. An optional capability might be considered innovative in nature or simply be of value but only to organizations with specific needs.

Start by reading the Selection Criteria portion of the Buyer's Guide, taking note of which capabilities are important to you, regardless of whether they are listed as *Required* or *Optional*.

## Selection Worksheets

We then provide you with a set of worksheets that you can print and use to evaluate each solution you are considering. Print out one copy of the worksheets for each solution being considered. Each criteria set and associated capabilities is represented in the worksheets, split up between *Required* and *Optional* capabilities.

Mousepads					
Required Features		Optional Features			
Capability	Avail.	Capability	Imp.	Score	Calc.
Ergonomic Design		Available in multiple color			
Memory Foam Wrist Rest		Available in multiple sizes			
Non-Slip Base					
Total Optional Score					

For *Required* capabilities, assess whether these capabilities are available for each solution. For *Optional* capabilities, assign a value in the **Importance (Imp.)** column representing how important each capability listed is to your organization on a scale of 1-10 (with 10 being very important). Then in the **Score** column, assign the solution a subjective score, again on a scale of 1-10, with 10 being the highest. Multiply each **Importance (Imp.)** value with the corresponding **Score** value to get the **Calculated (Calc.)** value. Add the **Calculated (Calc.)** values to get the **Total Optional Score**.



Your worksheets should look something like this when completed:

Mousepads					
Required Features		Optional Features			
Capability	Avail.	Capability	Imp.	Score	Calc.
Ergonomic Design	✓	Available in multiple color	1	1	1
Memory Foam Wrist Rest	✓	Available in multiple sizes	5	10	50
Non-Slip Base	✓				
Total Optional Score					51

Lastly, compare the availability of *Required* capabilities, and each of the Total Optional Scores for each solution being considered to determine which solution is right for your organization.



# Selection Criteria

Remote Monitoring & Management Solutions

Remote Access Solutions

Backup & Recovery Solutions

Endpoint Protection Solutions

Professional Services Automation Solutions

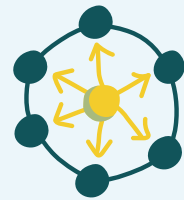
Choosing the Right Vendor Too

# Remote Monitoring & Management Solutions

Remote Monitoring & Management (RMM) is the crux of any MSP's list of services. It provides visibility into the customer environment that can serve as the basis for fixing application problems, patching operating systems, ordering new hardware to replace outdated machines, and more. The core value of any RMM solution is going to be first measured in what visibility it provides to the MSP, and then what actions can be taken based on the information gathered and presented. This criteria section focuses on both.

## Required Features

- **Cloud-Based Multi-Tenancy:** This is first, as any solution that lacks it is a non-starter. Your RMM solution should reside in the cloud and appropriately isolate each customer, making access to one or many customer environments easy and secure.
- **Centralized Monitoring and Alerting:** You can't manage what you can't see. RMM solutions need to discover and inventory computers and network devices, providing you with a dashboard view of a given customer's environment. This empowers you to assess the current and historical state of system hardware, OS, applications, peripherals, etc.; identify issues quickly; and respond to problems in-application. Automated alerting and notifications (to email, helpdesk ticketing, etc.) are also necessary to encourage proactive management.
- **Multi-OS Endpoint Support:** Usually implemented as a set of built-in actions, custom scripting, support for PowerShell and other external scripting languages, or some combination therein. Whatever the form, it's imperative that an RMM solution provides an extensible means of automating common tasks including software delivery, scripted updates, etc. to ensure a predictable outcome to any service need.
- **Patch Management:** While somewhat in the weeds, having an ability to keep operating systems and applications updated across the supported OSes is a fundamental part of any service revolving around endpoint and server management.
- **Reporting:** Reports can be used to identify specifically where issues exist, as well as help demonstrate value to the customer. Having an ability to run MSP- and customer-facing reports is crucial to communicating to both MSP and customer management.



## Why Start with RMM?

Remote Monitoring & Management services tend to be the foundation for most other services. With an ability to reach every endpoint and server, RMM solutions have the ability to assist with just about any other service you may be offering.



## Optional Features

- **Network Monitoring:** RMM solutions that use SNMP-based monitoring of routers, switches and printers can augment endpoints and servers for increased visibility and an added dimension to your RMM service offering.
- **Integrations:** Only listed here as optional due to the wide range of solutions RMM could integrate with. This includes solutions focused on endpoint solutions, backups, professional services automation (PSA), remote access, documentation, warranties, and analytics.
- **Service Planning:** Should your RMM services be a part of a tiered set of offerings, you may want to segment specific functionality to align, including onboarding endpoints with predefined policies, alerts, etc.

## Remote Access Solutions

Many MSP-centric RMM solutions provide this as an integrated part of their offering – either as an internally developed solution or through a third-party integration. However, because Remote Access plays such an important role in the everyday support of your customers, it's important to call out the important features to ensure you are equipped with the right toolset.

### Required Features

- **Remote Control:** While probably obvious, it should be stated that the whole point of solutions claiming to provide Remote Access – at a minimum – is to facilitate control over a remote endpoint or server.
- **SSL-Based Secure Access:** Because we're talking about providing (potentially elevated) access to a remote system from across the Internet, the security of the connection is critical. The communications should be encrypted, multifactor authentication of some kind should be supported, protection against brute force password attacks should be incorporated, and granular access over which technicians can connect should all be included.
- **Multi-OS Support:** At a minimum, every remote access solution should support connecting to the most recent versions of Windows, with Mac OS and Linux also being supported by some solutions today.
- **Attended or Unattended Access:** Technicians can't always wait for the user to be at their desk to solve a problem. RMM solutions that support remote control without requiring a user be on the other end increases tech productivity and speeds up the time to remediation.



### It's Critical to Get Remote Right!

It's just not cost-effective to have techs driving from customer to customer to solve OS and software-related problems. Having a solid remote access solution that can be used both interactively and behind the scenes to maintain the productivity of the tech and the user.

- **File Transfer:** The answer to a problem is often found in a patch, a script, or a set of updated files. Being able to transfer these directly to the remote endpoint makes solving problems quicker and with an assured result.
- **Integration with RMM:** There's no point pinpointing a specific machine within your RMM solution that needs assistance, only to have to memorize/write down/copy-paste the computer name into a second solution. The right Remote Access solution should be accessible directly from within your RMM dashboard.

## Optional Features

- **Background Maintenance:** In some cases, the work of solving a problem on an endpoint can be accomplished without disrupting its' user. Some RMM solutions include a remote command line or remote interface where they can manage system processes, services, users, permissions, files, and more.
- **Chat / Voice Communication:** In some cases, the user of an endpoint has no ability to call out. Having a secondary means to communicate via the Remote Access solution is helpful.

# Backup & Recovery Solutions

The world today has expectations on businesses of every size that they be up and running – even in the face of business disruptions, whether they be related to cyberattack, natural disaster, infrastructure failure, etc. Backup has become as necessary a service as any other you provide. But, as you'll see with the features listed below, there are many facets to providing a strong backup service offering.

## Required Features

- **Multi-OS Support:** It's assumed at this point in the Backup software industry that every solution supports backing up Windows, Linux, and Mac OS, in both physical and virtual instances, but I'm going to mention it just the same.
- **Multiple Backup Types:** The ability to back up data at either a file or image level in the same solution is also somewhat assumed, but – again – is noteworthy as being required.
- **Scheduling, Retention Policies, Notifications:** This is my last list of “assumed” features, but they each are crucial to automating backups, where data is stored and for how long, and who is to be notified should backups fail.
- **Cloud-Based Storage:** Backups today need to be cloud-first; recovery to the same location is not always a requirement with virtualization, and protection against ransomware requires



## Backups are Officially a Staple

It used to be thought that backup and recovery was “just in case”, but the massive increases in cyberattacks – particularly ransomware – have made having the ability to recover data an operational imperative.



immutability that offsite storage in the cloud can provide. You should be looking for a backup solution that supports multiple public and/or private cloud storage vendors.

- **Multi-Tenancy:** The data backed up is only for the customer that owns it. Any backup solutions designed for an MSP should have multi-tenancy to separate out data and management.
- **Optimized & Secure Data Transfer:** The use of compression and encryption technologies is necessary to shorten backup and restore times while ensuring the security of the data.
- **Reporting:** Reports can be used to identify what aspects of backups are working and which are not. They also can be used to help customers understand response times and justify the resulting work to make recovered systems operational.
- **Simplified Licensing:** Some solutions break up licensing based on the number of physical or virtual nodes, the OS being backed up, whether you're backing up files or databases, the used of file vs image backups, the number of restore processes, or based on storage requirements. You should be looking for a backup solution that provides access to as much functionality and the least "restrictions" in a single license purchase.

## Optional Features

- **Support for Local Storage:** Some customers still want a local copy of backups. Support for SAN, NAS, USB, and any system-local storage is usually included in solutions that support local storage.
- **Distribution Options:** Not every machine that will be backed up has the same connectivity back to the corporate office. So, it's helpful for solutions to have multiple ways the backup agent can be distributed, including deploying a package (e.g., via SCCM), via URL, or using PowerShell script. Additionally, having an ability to build into the distribution the user account, backup job to be used, cloud storage options, etc. is also often included.
- **Customer Interaction:** Some solutions provide an ability for customers to perform simple restores. Solutions that offer this should include granular security to limit what actions the customer can perform and with what backup jobs.
- **Orchestration:** Some solutions offer an ability to orchestrate the automated recovery of material portions of environments, including its entirety. Depending on whether your service focused on simply recovering data and systems, or if it's about operational resilience and availability is going to determine whether you will take advantage of orchestration.



## The "3-2-1-1-0" Backup Rule

Consider a solution that assists with meeting the new rendition of the "3-2-1 Backup Rule". 3 copies of your data, 2 storage mediums used for backup, 1 backup copy should be offsite, 1 backup copy should be offline, your backups occur with 0 errors.

- **Integrations:** Service desks can benefit from notifications of backup failures to issue a new ticket. PSAs can use the storage used to ensure proper client billing. Should you be advanced to use either of these solutions, a backup solution with integrations will be of great help in automating the backend of your business.

## Endpoint Protection Solutions

The endpoint has become the frontline of the war against cyberattacks. With over 90% of all cyberattacks targeting the endpoint (usually starting with a phishing attack), it's imperative that the endpoint itself be protected. The legacy model of Antivirus has evolved into endpoint protection which places a huge focus on endpoint *behavior* over simple signatures and heuristics. I should warn you: there are a lot of buzzwords thrown around in this particular market, so it's important that you really try to understand the protective outcomes your solutions have achieved probably more so than just whether they have the shiny new feature.

### Required Features

- **Real-Time, Layered Intelligent Detection/Blocking:** The first goal is to keep malware from ever executing on your machine. Using a mix of global threat intelligence, Artificial Intelligence, Machine Learning, process inspection, application control, dynamic behavior analysis, and other technologies in tandem.
- **High Efficacy Rates:** Regardless of the technologies used, the solution should result in a high detection efficacy rate of both known and zero-day exploits, scripts, as well as file and fileless malware, with a low false positive rate.
- **Multi-OS Support:** You need the same levels of protection on as many endpoint OSes as possible, including Windows, Mac OS, Linux, and Chrome OS.
- **Simplified Deployment:** You want a single, very light agent that can be quickly and easily installed on-premises or over the Internet to ensure every endpoint is protected.
- **Automated Response:** This one gets a little fuzzy, as some MSP-centric solutions tout themselves as a form of Endpoint Protection, while others talk about Endpoint Detection & Response (EDR). There is a dividing line between the two, with EDR usually having more functionality on its' response side, but the point here is the solution chosen should have capabilities beyond the obvious quarantining of the process or file, and offer machine isolation, termination, and cleaning of droppers and malware, etc. to reduce the likelihood of needing to completely wipe and reimage an endpoint.



### Endpoints Require Layered Security

Threat actors are constantly changing their tactics, looking for new ways to attack undetected. So, it's important that your endpoint protection layer its' security with different methods of detection to decrease the likelihood of a successful attack.



- **Centralized, Multi-Tenant Management:** I'm summarizing here, mostly because we've beaten this topic to death already in this Buyer's Guide. But the solution should allow for management and reporting of each customer's environment from a single cloud-based solution.

## Optional Features

- **Integrations:** Post detection, depending on your service offering, you may want to offer investigations, Managed Detection & Response (MDR) services, or even threat hunting. Integrations with SIEM, EDR (assuming you simply have Endpoint Protection in place), virtual sandbox, and SOAR solutions, as well as the sending of data via REST API, Syslog, etc. are enablers for augmenting basic endpoint security services with more advanced flavors of offerings.

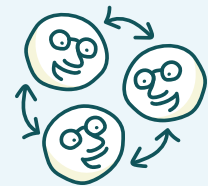
# Professional Services Automation Solutions

The backend of your business needs to be in order for the front end to run smoothly. Your goal is to create a predictable (and, therefore, profitable) business. Predictability is found in having defined contracts, an established process of documenting and addressing problems, and an ability to see what your services are costing you. Professional Services Automation (PSA) solutions take that mess of a business you run behind the scenes and organize, document, and standardize it. To make this one easier, I'm going to list the core functionalities shared by the leading PSAs as Required below and list some of the differentiators from each as Optional.

It should be noted that your mileage here will vary by functionality, so dive a bit deeper into each solution you're considering.

## Required Features

- **Speed of Implementation:** Most PSA solutions measure the time it takes to implement in terms of months (keep in mind you're literally setting up the backend of your business). Be mindful of the cost that time bears on your business as your attention is diverted away from other aspects of your business during that time.
- **Service Desk:** More than just a ticketing system, the right Service Desk functionality should enable MSPs to provide better service through customer insights, automation and workflows, and visibility through dashboards and analytics.



## Don't Forget Your Backend!

It's important that your services are based on cutting edge solutions. But if the back end of your business isn't automated, there won't be enough time to actually service customers cost-effectively.

- **Account Management:** Sales and marketing efforts need to be established, automated and optimized throughout the buyer's journey. Most PSA solutions provide, at a minimum, a means to track opportunities and pipeline, with others providing greater visibility into marketing efforts and going as far as to launch and measure marketing campaigns.
- **Procurement:** Most PSAs offer an ability to automate the entire process of procuring needed hardware and software and making it available for sale to customers, including purchase requisitions, purchase orders, vendor relationships, buying goods and services, and maintaining inventory.
- **Time Tracking & Utilization:** A large part of profitability is determined by the time your techs take to address customer issues. This PSA functionality provides visibility into the management of time spent. The goal is to optimize efficiency, productivity, and distribution of time across your workforce.
- **Billing:** Your PSA should be able to easily bill customers based on defined services, usage (as in the case of storage in some Backup service offerings), and billable hours (since you have time tracking in place). The right solution automates the process based on subscribed services and work performed, making billing easy.
- **Analysis & Reporting:** A PSA should be seen as the central view of an entire MSP business, This provides you with visibility into where your opportunities are to optimize operations. Additionally, customer-focused reporting should also be included to provide customers with insights into spend and services received to help them understand the value you bring.
- **Integrations:** Even if a PSA solution lacks some functionality, most vendors provide a way to integrate with other systems to provide a more complete solution. Whether that is via a more robust Customer Relationship Management (CRM), RMM, Backup, security solutions, automating tasks that translate technical service delivery specifics (e.g., the amount of storage used in backups this month or alerts from your RMM solution) into business functions such as billing, time tracking, service desk tickets, and more.

## Optional Features

- **Project Management:** Should you want to manage one-off projects (e.g., a migration), this functionality should include an ability to plan people, process, and tasks, using templates that establish standardized efforts while allowing the flexibility needed to address changes in projects.



- **Document Management:** A few PSA solutions augment their Service Desk functionality with central repositories of client standards and documentation. In many cases, some of this is already included in a Service Desk, so be sure to understand if there is a benefit based on a given PSA's functionality.

## Choosing the Right Vendor Too

Unlike our standard Buyer's Guides, this topic warrants some overarching final thoughts around what you should be looking for in your solutions that crosses every solution type covered in this Buyer's Guide – and that has as much to do with the Vendors you choose to do business with as it does the software you employ from them.

So, here's some thoughts about the vendors to consider:

- **Ease of Doing Business With:** Just because a vendor has a solution that looks great doesn't mean it won't be a rocky road. Take a close look at the partner program and make sure it's your success that the program is built around. Ask to speak with existing customers and dig into them with lots of questions about how it is to work with the vendor at every step of their relationship – from sale, to implementation, to support, to renewals, etc.
- **Quality of Support:** Their support may very well one day determine whether your business is up and running. When doing a proof of concept, be sure to evaluate their support from a responsiveness, expertise, and customer-centric perspective. You should walk away from a support call feeling like you were on the phone with one of your own employees rather than a vendor.
- **Product Direction:** You like what a vendor offers today, but does their roadmap match where you want to take your business? Understand their product roadmap – whether they're talking development, integrations, or acquisition. You want to see alignment between their future and yours.

With all these considerations in mind, you will have a much better sense of which solutions will be viable candidates to take your MSP business to the next level.

# Evaluation Worksheets

Please feel free to print out the following evaluation worksheet pages, filling in a copy for each of the shortlisted vendors your organization is considering.

The online version of this worksheet can be found at:  
[goto.cg/3zVa1qs](https://goto.cg/3zVa1qs)



## Remote Monitoring & Management Solutions

Required Features		Optional Features			
Capability	Avail.	Capability	Imp.	Score	Calc.
Cloud-Based Multi-Tenancy		Network Monitoring			
Centralized Monitoring & Alerting		Integrations			
Multi-OS Endpoint Support		Service Planning			
Patch Management					
Reporting					
Total Optional Score					

## Remote Access Solutions

Required Features		Optional Features			
Capability	Avail.	Capability	Imp.	Score	Calc.
Remote Control		Background Maintenance			
SSL-Based Secure Access		Chat / Voice Communication			
Multi-OS Support					
Attended or Unattended Access					
File Transfer					
Integration with RMM					
Total Optional Score					

## Backup & Recovery Solutions

Required Features		Optional Features			
Capability	Avail.	Capability	Imp.	Score	Calc.
Multi-OS Support		Support For Local Storage			
Multiple Backup Types		Distribution Options			
Scheduling, Retention Policies, Notifications		Customer Interaction			
Cloud-Based Storage		Orchestration			
Multi-Tenancy		Integrations			
Optimized & Secure Data Transfer					
Reporting					
Simplified Licensing					
Total Optional Score					

## Endpoint Protection Solutions

Required Features		Optional Features			
Capability	Avail.	Capability	Imp.	Score	Calc.
Real-Time, Layered Intelligent Detection/Blocking		Integrations			
High Efficacy Rates					
Multi-OS Support					
Simplified Deployment					
Automated Response					
Centralized, Multi-Tenant Management					
Total Optional Score					



# Professional Services Automation Solutions

Required Features		Optional Features			
Capability	Avail.	Capability	Imp.	Score	Calc.
Speed of Implementation		Project Management			
Service Desk		Document Management			
Account Management					
Procurement					
Time Tracking & Utilization					
Billing					
Analysis & Reporting					
Integrations					
Total Optional Score					

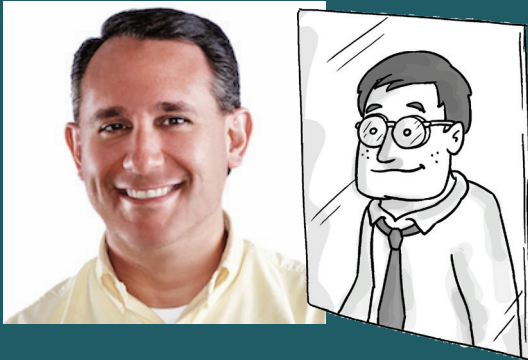




## About the Sponsor

Established in 2011 by a group of IT professionals, MSP360 provides simple and reliable cutting-edge backup and IT management solutions for MSPs and IT departments worldwide. The MSP360 platform combines the number one easy-to-use backup solution to deliver best-in-class data protection, secure remote access software to provide support to customers or team members, and painless RMM to handle all aspects of IT infrastructure.

To learn more, visit [www.msp360.com](http://www.msp360.com)



## About the Author

Nick Cavalancia is a 4-time Microsoft Cloud and Datacenter MVP, has over 25 years of enterprise IT experience, is an accomplished consultant, speaker, trainer, writer, and columnist. He has authored, co-authored and contributed to dozens of books on various technologies, and regularly speaks, writes and blogs for some of the most recognized tech companies today.



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