

Managed IT services buyer's guide 2024

How to choose the right IT support company for your organisation if you're new to IT Support, or thinking of changing provider.

Hi there,

This buyer's guide is designed to assist you in the decision-making process when engaging a managed service provider (MSP) for some or all of your IT needs.

We understand that identifying your own requirements, evaluating service providers, comparing cost and contract terms can be time consuming, complicated and frustrating. This guide will act as a framework to ensure you are making informed choices.

You might be reading this document because you're not completely happy with your current IT support, or perhaps you have no IT support at all. This guide demonstrates what great IT support and services looks like.

Investing in technology isn't just about the essentials such as protecting your organisation from cyber crime, it's about embarking on a true partnership and building a relationship where your trusted IT partner will help to develop your IT strategy to drive your business forward.

That's all from me for now, but please do call us on 01274 918 777 if our team can be of assistance.

Mark Fisher
Managing Director

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Why choose an IT partner?

Quick response times

Whether you have in-house IT support or not, there is always access to a Service Desk for remote support with guaranteed response times.

Access to additional staff

When facing critical IT issues, you have the back-up of additional team members. In addition, there is cover available for illness and holidays.

Scalable support

For IT projects, support can be scaled up, allowing you to work with a technical team and account manager that are already familiar with your organisation.

Wide skill set

A managed service provider will typically have a larger team with a breadth of expertise and specialists in many different areas. To employ an individual with all these skills would be difficult and costly. This is where outsourcing IT support can be a major advantage. You can rely on your IT support provider to be up to date on best practices, new technology and emerging risks in areas such as cyber security.

Recruitment

With an IT partner, the complication of knowing the skills needed in an IT technician or attracting the correct skillset is entirely removed. Furthermore, if you wanted to share the IT support between in-house and outsourced, your IT partner can help with recruiting new team members.

Planning

A good IT partner will go beyond the day-to-day tasks and assist with planning your technology strategy, budgeting for rolling hardware replacements and helping you to make the most of IT to meet your business goals.

Cost saving

There are many ways in which outsourced IT support can save your organisation money.

- There is a reduced need to pay for specialist training or expert equipment as your IT support provider will already have this covered.
- You only pay for the IT support that you need, and the support is tailored to your needs.
- An IT partner provides access to lower cost technology solutions and enterprise-level technology through their partnerships and relationships with suppliers.

Proactive support

An IT partner will implement 24/7 monitoring and can proactively address issues to minimise disruption and improve uptime.

IT strategy

Every business, irrespective of size, should have an IT strategy. An IT strategy will allow you to be proactive with your technology use, rather than reactive, ensuring that technology is enabling your business to meet your long-term goals.

Goals

Alongside your business plan, your IT strategy should consider both your long and short-term business goals and identify what type of technology investments are required to keep these goals on track. Having a budget as part of your IT strategy allows you to track your expenses, prioritise your spending, reduce unnecessary costs and identify areas of insufficient resources which can affect business growth and potentially expose your company to risk.

Budget

Ideally you should have a short and long-term budget, covering at least the next 12 months and longer where possible, with contingency funding so that you can be adaptable if any unexpected costs arise.

Budget planning

Here are 10 key considerations to make when compiling your IT budget as part of your IT strategy. We've written a [blog post](#) on this if you want to read more.

1. Analyse your business goals
2. Identify recurring expenses
3. Audit your IT hardware
4. Establish priorities
5. Audit past and present IT budgets
6. Plan project expenses
7. Cyber security
8. Use your data
9. New technologies
10. Consider outsourced IT support

Technology roadmap

When working with a good IT partner, they will play a fundamental part in your IT strategy and will put together a technology roadmap, which will assist you in budgeting. A technology roadmap will allow you to see which IT investments are required and when – with an indication of priority and necessity, alongside the recommendations. The roadmap should cover at least the next 2-3 years, and is a great resource for both you and your IT partner to plan ahead.

Strategic reviews

You can expect an IT partner to engage in regular strategic reviews. The schedule of these may vary depending on the size of your organisation and complexity of your infrastructure, but we'd recommend 6-monthly as a starting point. These reviews are an excellent opportunity for you and your IT partner to look and what's going well and where you may need extra help.

Although we've been talking about your IT strategy, it really is more about your business, and how technology can help you to achieve more.

A word from our Commercial manager,

An IT partner can add significant value to your organisation when they go beyond the day-to-day tasks, taking the time to understand your business in order to provide proactive advice, specific to your business, on how you can use IT to your advantage.

Roadmapping, strategic reviews and help with IT budgeting are an essential aspect of a successful long-term IT partnership, providing IT leadership and direction, for those organisations who don't have their own IT director or network manager.

At Primary Technology, we pride ourselves on our tailored client-focused approach, and I'm proud of our team and the service that we deliver.

We hope you find the rest of this guide helpful on your journey with IT support, and I'm always available on 01274 918 777 if you have any questions.

Chris Ginley
Commercial Manager

Managed IT services

What should you expect to be covered by a managed IT services contract? Many of these services are proactive measures to stop IT issues before they occur and maximise your uptime.

Service Desk remote support	Ticket-based remote support via telephone and email with a “first time fix” policy, in accordance with the MSP’s SLA. Most providers should have an experienced Service Desk with escalation points available for the resolution of more complex issues.
Account management	<p>An experienced account manager should be assigned to your organisation and you should be offered regular engagement from your service provider in the form of strategic reviews, at least every 6 months.</p> <p>Regular review meetings will help define and manage progress, whilst ensuring the service is continuously meeting and exceeding expectations.</p> <p>The provider should also create a technology roadmap and play a prominent role in your IT strategy and budgeting.</p>
Asset management	Using a remote monitoring and management platform (RMM) to maintain a register of all assets. This allows the MSP to see information such as licensing, contracts, devices and infrastructure. This data can be used to make recommendations for proactive improvements to your infrastructure as part of strategic planning.
Remote monitoring and management	24/7 monitoring, enabling the Service Desk to easily and effectively monitor the health of devices and your network resources. This system allows the MSP to manage potential problems before they create downtime.
Network and security monitoring	Tailored alert thresholds based on the categories of performance (e.g. memory usage, CPU load), and hardware (e.g. hard disk usage, temperature, etc.) are configured to ensure any issues are resolved quickly and efficiently by the MSP.

Backup management	A choice of backup from industry leading providers to provide affordable, high-performance backup and replication solutions to maintain consistent and secure backups.
Preventative maintenance	<p>A range of preventative measures to reduce issues and failures arising from hardware, software and cyber attacks.</p> <p>Security updates are essential to stop exploits and vulnerabilities to any and all IT devices. Updates should be checked for known compatibility issues, tested and then deployed to devices.</p> <p>Robust processes for tasks during downtime (holidays, out of hours) incorporating software and firmware updates for your infrastructure and servers.</p> <p>Reviews of critical infrastructure should be completed to ensure that it is fit for purpose and renewed when required, ensuring where possible that hardware has extended warranties and will last the anticipated and recommend amount of time.</p>
Procurement	<p>As part of your IT roadmap and IT budget, the provider and yourself should agree on a rolling replacement strategy for hardware, software and services.</p> <p>The aim should be to maximise the useful life of all hardware without unduly jeopardising business operations whilst spreading costs over time. The MSP should discuss strategies for maximising the life of hardware.</p>

Reasons to switch IT provider

Generally, organisations don't like to change IT provider as it requires change across all departments of your organisation. We often hear from companies that aren't happy with their current service and are considering making a change. Here are 10 of the most common IT support provider problems that we've come across.

1

Communication is poor or inconsistent

This includes a range of issues, from taking too long to acknowledge tickets, not communicating updates, or not responding to your queries in a timely manner.

A good IT support provider should be in regular communication with you and your team. You should also have periodic contact for strategic reviews.

2

Fix times have become unreasonable

It can be expected that some issues won't be resolved immediately or will require diagnostic work, but communication is key here and you must be kept updated.

If issues are regularly taking too long to be resolved, it may be time to consider alternatives. A good gauge is comparing typical response times to what they were at the beginning of your contract.

3

Repeatedly experiencing the same problems

Your provider should be investing time to analyse and reduce recurring issues. If you keep having the same issues, with only a quick fix being implemented each time, this is a cause for concern.

These small repetitive issues can impact productivity and lead to bigger problems if not addressed.

4

Your IT support partner isn't proactive

Some providers are reactive only, fixing issues as they occur. This isn't really a managed service provider. Whoever you choose, they should be collaborating with you on a long-term IT strategy and proactively working to prevent issues happening before they cause problems.

Technology can transform a business; embracing new technology can help your organisation to grow and meet your goals.

5

You're not seeing the benefits of an IT partner

You should be able to see clear benefits of your IT partner. If not, it's worth questioning if they're worth your investment.

Beyond fixing day-to-day issues, they should be heavily involved in your IT strategy, providing technology roadmaps and recommendations to help drive your business forward. They may also have metrics to demonstrate their worth.

7

Confusing jargon causes a poor relationship

Your chosen partner should take the time to explain what they are doing and thoroughly describe any recommendations in a way that you understand.

This is key to allow effective communication and maintain a good relationship. It works both ways though, you must do this too!

9

Being overbearing with sales

A true partner will help you to maximise the life of hardware to save money without affecting operations. They recognise it's nice to have the latest technology, but not always a necessity. Infrastructure will be prioritised before devices. A partner who is always trying to sell you new equipment is probably a red flag.

6

Not taking data security seriously

You should expect to hear quite a lot about data security from your IT support partner, to the point where perhaps you're fed up of hearing about it!

Any good provider will be continuously educating themselves on the latest cyber security threats and should be encouraging you to be as secure as possible.

8

You can't learn from them

A good IT partner will share their knowledge, it might be in the form of blogs, newsletters or social media. They should take the time to explain what they are doing and why.

This one isn't a necessity, but it's certainly an added extra and demonstrates the provider's approach to consistent improvement.

10

You feel you've outgrown their capabilities

Compared to the beginning of your contract, you may feel you are too big for them to adequately support you. If you're not confident of their abilities, the provider may feel the same way and raise this with you. You need to be reassured that your provider is capable of helping in an emergency or disaster recovery situation.

What to ask a potential IT partner

As an unregulated industry, anybody can establish themselves as an MSP or IT support company. Whilst there's a place for IT support of different sizes, it can be difficult to determine if a company, unknown to you, is capable of looking after your business. There are a few questions that we'd recommend asking a potential new IT partner.

What's your process for dealing with IT issues that we report?

Here, you're looking for evidence of a robust process, ideally a professional ticketing system so that tickets are systematically logged and worked through by a service desk team.

There should be an SLA that stipulates response times for each priority category.

What do you do to minimise the number of IT issues?

The key answer is proactive rather than reactive support.

24/7 monitoring is essential to spot potential problems and minimise downtime.

Detailed technology roadmaps should be created so that the majority of infrastructure and devices are replaced before becoming problematic.

What benefits can we expect to see from using your services?

The generic answer to this is probably what you'd expect to hear - efficiency, cost saving and the service itself.

Beyond that, look for an answer that's specific to your business and shows they've done their research. Better still, it ties back to your business goals, because IT support is about improving your business and not just IT.

Tell us about your team and who will be working with us?

Most providers will provide you with an overview of their key team members, or perhaps an overview of their company structure.

You should be assigned an account manager who will oversee all of your services and be your main point of contact, including arranging your regular strategic reviews.

What else might you ask

- How is my data protected?
- Is there training to ensure my staff get the most out of this investment?
- Are there metrics to assess speed, reliability and overall performance?
- How does your team stay current with new technology developments and trends?
- Can you provide customer references and access to existing customers?

Things you should know about IT services

1

Your systems need 24/7 monitoring

This is non-negotiable. There will be updates for your network, infrastructure, software and devices. Things that can go wrong should be monitored!

2

An IT partnership requires commitment from you too

As much as you're paying for the service, you need to be prepared to listen to recommendations and invest where advised.

3

Outsourcing IT support can save you money

With access to higher service levels, partnerships and tailored support, an MSP can save you money.

4

Investing as much as you can afford in IT, will pay off

Generally, the quality of the IT support received, and the same with hardware is reflected in the cost, especially in respect of protection against cyber crime.

37% of businesses in the UK and Ireland named disaster recovery as their top data protection-related project for 2023.

source: computerweekly.com

63% of businesses named cyber security when asked what technology areas had become significantly more important in the past two years.

source: computerweekly.com

What's difficult about changing IT provider

Internal IT staff

In-house staff may express concern about the security of their role as a consequence of outsourcing.

Most organisations retain their in-house staff and they work in partnership. Bringing in external help means in-house staff can be free from their routine tasks and benefit from access to newer technologies and learning from others.

Regulatory requirements

Your organisation, especially if you are a financial or social care institution may be required to comply with legislation or other legal requirements, therefore you need to ensure the IT partner you choose can attain to and maintain this compliance.

Disruption and change

It's incredibly common for people to dislike change. Many people don't like it, even when it's for a longer-term benefit. Changing IT provider can mean using new systems to allow the required integrations or because your new provider uses different technology vendors. Be patient with your employees if they express their concerns or take a while to get used to new setups.

can save your organisation money. You'll most likely be billed monthly for the services. However, if your infrastructure doesn't meet certain requirements, there may be upfront recommendations made that are necessary or strongly advised to accommodate the new managed service.

Finding the right expertise

It can be beneficial to find an MSP that already works in your sector, as they are more likely to have the background knowledge and experience to develop the technology in your organisation, in a tailored and meaningful way. Additionally, it's important to ensure their knowledge and services are a good fit. For example, if you use MacBooks, the MSP needs to have expertise supporting Apple environments.

Contract length

Managed service provider contracts will often require you to wait until the end of the contract before allowing you to serve notice. This can be difficult if you are unhappy with their service or do not feel the partnership is working for you. There can also be a strict notice period at the end of the contract, often 90 days, but varying per provider. It's imperative to check on the notice period in your contract, to ensure you give notice in the correct time frame to prevent auto-renewing for your original contract length.

Service level agreements

This forms the basis of your working partnership and it's important to ensure you fully understand it (if you don't, don't be afraid to ask

questions) and you need to be happy that it includes provisions for the level of support, operating times, privacy and data security guarantees, performance targets and escalation routes.

Exit plan

The final, often overlooked component of a successful managed service provider is a transparent exit plan. Maybe you will transition to in-house support or decide that you need a change of provider. To help ensure the process is professionally managed, your provider should include an exit plan as part of their contract.

The exit plan should clarify if there are any costs involved in handing over to a new provider. It should confirm that all passwords and access to systems will be handed over and also how much documentation (network topologies, infrastructure configuration, device warranty details) will be provided.



Our Trust has received excellent support, consultancy, development and creative ICT network solutions from Primary Technology. Their engineers who are always on call to respond to any queries, have transformed our ICT across a number of sites. The team at Primary Technology work closely with Trust stakeholders and our internal IT team.

Working in partnership

Co-managed IT support can offer guidance to in-house IT staff and complement and advance their skillset, without the need to pay for additional training. Whilst it's a possibility that in-house IT support staff may initially perceive outsourcing as a threat, the reality is often that they are broadening their skillset by working with a third-party, and are allowed the time to concentrate on their core job role, whether that is hands-on day-to-day IT support or focusing on strategy and wider IT management.

There is access to a wider team to help with bigger tasks or an escalation point for more complicated tasks or issues when required. Utilising a third-party IT partner allows IT technicians and network managers the time they need to focus on their key tasks.

Cyber security

With the methods of cyber security attacks ever evolving, it's a priority to protect your organisation with a range of preventative measures.

Protecting against cyber security threats is an ongoing battle. Hackers are constantly evolving their methods to gain access to systems and finding new bugs in software and cloud services that can be exploited in order to infect, steal or corrupt your data.

Malware

Malware is software that is designed to destroy and damage computers and computer systems. It includes viruses, spyware, adware and ransomware.

You can be infected with malware in a variety of ways such as spam emails with malware attachments, legitimate websites that have been compromised or when searching for software or other media online.

A variety of steps should be taken including user education, endpoint detection and response services, content filtering on your network, DNS-level protection and limiting administrative access on devices. Secure backups and disaster recovery plans are also essential.

Ransomware

Ransomware is a kind of malicious software that encrypts your data, meaning you are unable to access it. The hackers attempt to hold you to ransom to regain access to your data.

One of the most common ways of being infected with ransomware is by clicking a link in a malicious email. These can be quite sophisticated and difficult to spot.

Cyber security training

A good IT partner will recommend that you deliver regular cyber security awareness training for all staff, on the basis that the weakest link for cyber security is often human error.

Security awareness training helps your employees understand how to reduce the risk of cyber security incidents. This is usually achieved with an online training platform that delivers video content, although can also be delivered in-person.

Cyber criminals target weaknesses in organisations, with the human element providing a significant weak point that can be exploited. It's easy for criminals to send spam

and they only need a tiny success rate to potentially cause a serious cyber incident. This is why your users should be exposed to a variety of example threats to enable them to identify and report suspicious emails.

Regular training can also help to build a culture that encourages reporting suspicious emails and seeking help from your IT team.

We recommend implementing a service that allows you to run cyber security awareness campaigns where you can monitor results and gain insights into your organisation's vulnerabilities.

Phishing simulation tests

Most cyber security training packages include phishing testing or phishing simulation. This involves sending simulated spam emails to help staff recognise and report the threats.

If anyone clicks on one of the simulated phishing emails, they are provided with details of their error and how to spot the signs of phishing in the future.

The outcome of phishing tests can be automatically monitored to provide insights into where further training is required.

Which cyber security topics are discussed in training?

- Email clients
- Cloud services
- Web browsers
- Mobile phones
- Social engineering
- Impersonation of key staff
- Impersonation of your customers or suppliers
- Password security and password hygiene
- Compliance with data protection or industry regulations

32% of businesses reported a data breach or cyber attack in 2023.

This is much higher for medium-sized businesses at 59% and 69% for large businesses.

source: gov.uk

37% of businesses report being insured against cyber security risks, rising to 63% of medium-sized businesses and 55% of large businesses.

source: gov.uk

About us

Everything we do at Primary Technology is underpinned by our values to act sustainably, to work with integrity and to use innovative tools and processes to do what's best for our customers, employees and partners. We strive to continuously improve using new technology and processes that have a positive impact on customer outcomes.

The Primary Technology journey began in 2004, in a small side-office. Since then, we have outgrown two further offices until taking up our current headquarters in Bradford.

Nearly two decades later, we've helped organisations across the public and private sector adapt and thrive in the continually changing technology landscape, delivering bespoke, reliable IT support and services. We're still working with customers that have stayed with us since the very beginning.

As we have progressed, we have built strong partnerships with globally recognised brands, including Microsoft, Google, Dell, HP, Cisco and many more.

Our commitment to quality has enabled us to grow our team and offer expertise across a range of technology products and services, becoming a highly regarded, dependable provider to public and private organisations.

Our values

Sustainability - We are committed to reducing our impact on the environment and improving the effect we have on society.

Integrity - We are committed to act with integrity and maintain a culture of ethical practices across the organisation.

We continually improve by implementing new ways of working, adapting to new technologies and delivering creative solutions by clearly understanding the needs of our customers.

Our approach

Our approach is collaborative and is designed to guide you towards the solution that delivers the optimal outcome.

We listen and understand how your organisation operates, the past challenges you've faced and your future needs, from a commercial and technical perspective. This enables us to propose an appropriate solution that can be measured against key requirements with a clear implementation roadmap.

We deliver your proposed roadmap and implement technical elements that are reviewed at key stages, managed by a team of technical specialists and lead by your dedicated technical account manager.

We enhance the solution after delivery with proactive support and continual improvements based on new technology and processes that can positively impact uptime, data protection and usability.

Our vision, mission and goals

Our vision: To empower our customers to increase their quality through the smart use of technology.

Our mission: To design, deliver and support market leading technology solutions as a trusted partner of choice.

Our goal: To create sustainable growth through investment in our people, products and services, while fostering an open and transparent culture.



What our clients say about us

We're the trusted IT partner to organisations working across a wide range of sectors, ranging from small business to enterprise and public sector environments.

Our experience with Primary Technology has been extremely positive from day one. Within just over 6 months, we have been on a real journey with developing our IT systems and processes, particularly around data security. Mo and the team have fully understood our brief and this is largely due to spending time in our service, getting to know who we are and what we do.

Lindsay Roome, PA to Chief Executive Officer, Ripon Community Link

I really needed an IT support business that I can rely on and trust to support me when things from time to time go wrong. I have really benefited from having their expert knowledge and excellent support for a few years now. It's a great reassurance to me that they are always there when I do need them.

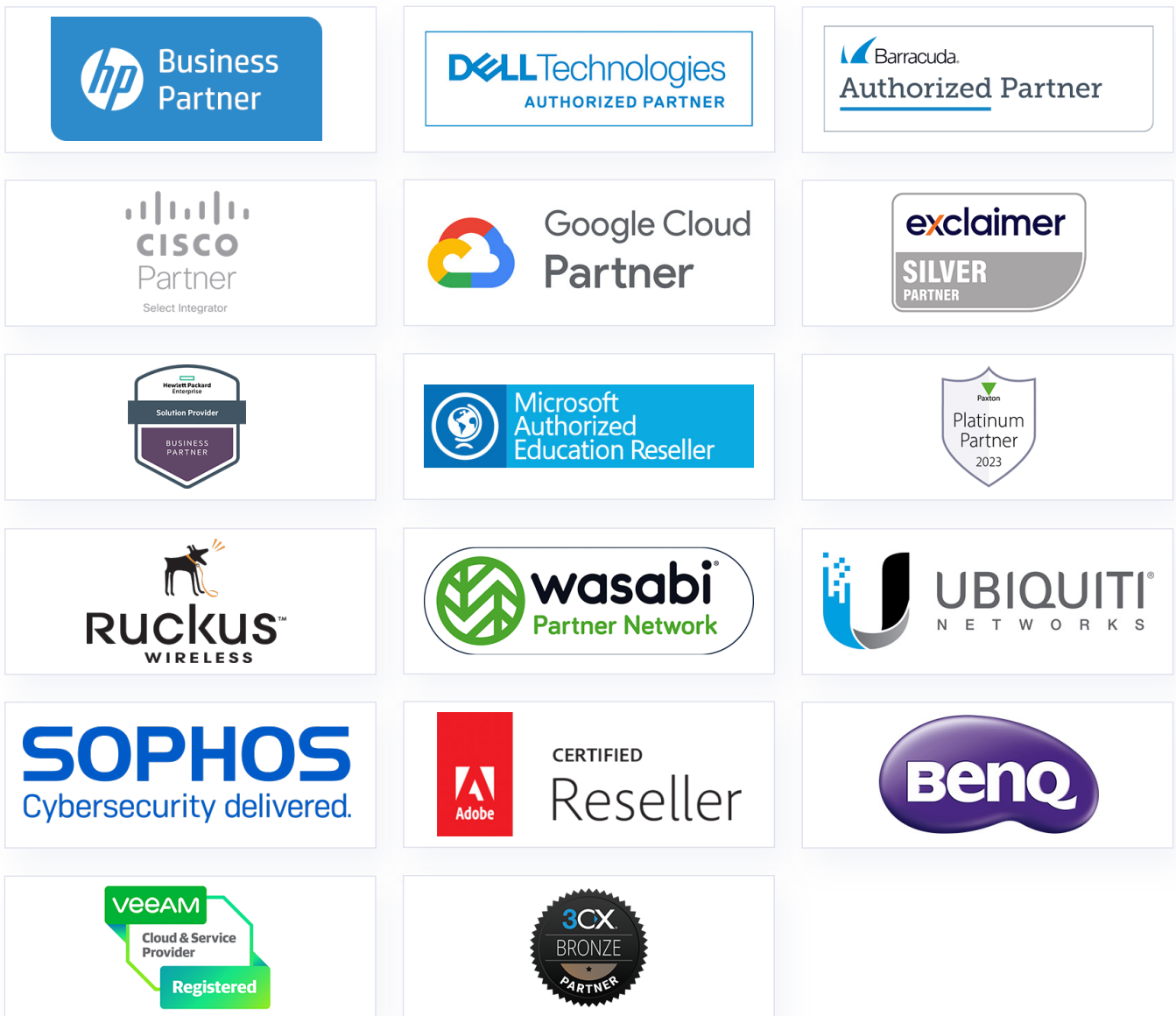
Helen Bradshaw – Owner, Metropolis Events

From the initial IT review, we could see that they offered a blend of customer care and technical expertise. They identified security vulnerabilities and key areas for improvement in our priority IT services such as backups and Microsoft Office 365, and with their expertise, we have seen cost savings in these areas.

Claire Morton, Merchandise Manager, Blue Sky Designs

Technology partnerships

Before we decide to partner with existing brands, products and services, we will research the solutions on offer to ensure they will add value to our customers. We then build strong partnerships and commit to earning the required accreditations and certifications to ensure we have the knowledge and tools to best deliver on the partnerships.



Onboarding

Any reputable IT support partner should adopt a clear onboarding process. Here's ours, step-by-step.

1

Introduction

We will assign you a dedicated account manager to transition your existing IT services and guide you through the whole process.

2

Handover

Your account manager will work with your current provider where possible, to obtain the key information required, this includes details and passwords of your existing services.

3

Deployment

Our technical team will install and configure everything required so you can use our ticketing system, and we can proactively monitor your IT infrastructure. This might involve a site visit.

4

Documentation

We will complete any onboarding projects and fully document your infrastructure and devices.

5

Training

We'll ensure your entire team knows how to log tickets and work with us effectively.

6

Launch

We always aim to complete your onboarding within 30 days.

1 month

After one month we organise a review to ensure everything is running smoothly following handover.

3 and 6 months

We hold a service review, usually via Teams, so you can alert us to any issues or required improvements.

12 months

We schedule a strategic review that focuses on your technology roadmap and planning for the next few years.

Successful partnership

Once an initial start date for your managed service has been agreed, our internal technical teams will liaise with your assigned account manager to ensure we have all of the relevant information we require.

During this stage our technical team may wish to meet with your outgoing managed service provider and/or named contacts for IT/operations to further ensure a smooth delivery.

Any site visits required will be arranged by your account manager, with your prior agreement. They will also arrange the final “go-live” appointment with our technical team to get the services live for you.

We hope to work with any new partner for years to come, and this onboarding process is designed to set our partnership up for success.

Whilst your account manager will guide you through the process to make it as simple as possible, we'll require your patience whilst we carry out our surveys and request information from you.

The more information we have, the better we understand your infrastructure, your business and your goals and are better equipped for a long and successful partnership.

Onboarding aims

The aims of the onboarding process, in addition to getting your service initiated are:

Get to know your business and employees via both a technical survey and talking to you and your colleagues.

Remedy any issues you are currently having.

Begin to outline your technology strategy and roadmap.

Talk to us

We hope this guide proves useful if you are considering a new IT partner now or in the future.

We are currently taking on new clients and we are always keen to talk to new organisations.

You can book a 15 minute, no-obligation video call with one of our account managers here:

primaryt.co.uk/book

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🌐 primaryt.co.uk

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