MANAGED IT SERVICES · BUYER'S WORKBOOK

The Essential IT Provider Evaluation Workbook

A practical guide to choosing an IT partner that will support your business for years to come.

CONTENTS

What's Inside

This workbook guides you through every stage of evaluating and selecting a Managed IT provider. Work through each section at your own pace, use the checklists and scoring grids during supplier meetings, and refer back to it whenever you need to.

How to use this workbook: Work through each section before and during your provider selection process. Bring it to supplier meetings. Use the scoring grids to compare providers objectively.

SECTION 01

Why This Workbook Exists

Most businesses only change their IT provider every five to eight years. It is a significant decision. If you make a poor choice, you will likely be looking again in a year (if the contract permits you), but a good choice is likely to last you for many years to come.

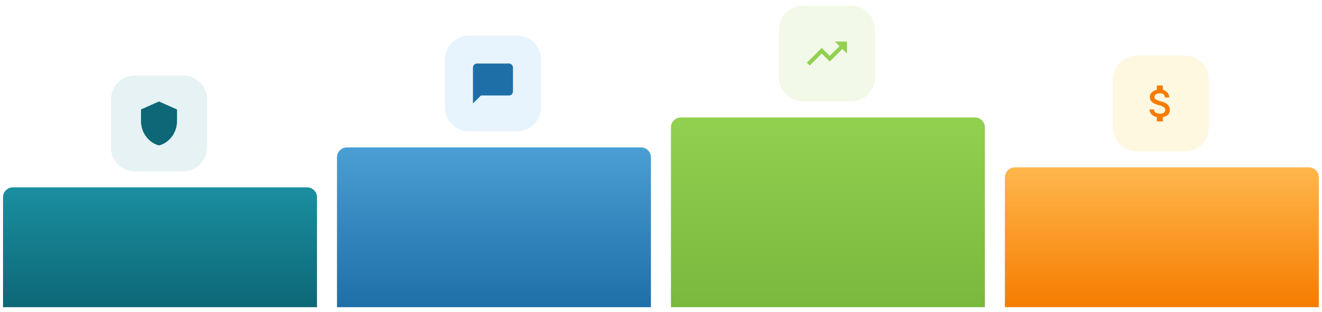
Managed well, a change of provider can be a seamless, risk-free process, without impacting staff. In just 30 days (the average onboarding period), a new partner can begin delivering far better results for you and your colleagues for years to come.

5–8
Years between IT provider changes for most businesses

2–3
Years before frustration sets in when cost is the only criteria

4×
The typical cost of switching providers twice vs. choosing well once

WHAT A GREAT IT PROVIDER DELIVERS



Lower Risk
Fewer outages, better security

Better Service
Fast, responsive, proactive support

Business Growth
Technology that enables ambition

Lower Cost
Value over time, not just monthly

A good IT provider balances all four outcomes - not just the monthly invoice.

BUYER TIP **"Choosing the cheapest provider is rarely the cheapest decision over five years."** Factor in the hidden costs of downtime, poor security, staff frustration and the disruption of switching providers again within two years.

SECTION 02

Before You Start

Before evaluating any provider, take ten minutes to capture your current situation. This will help you ask the right questions and compare providers against your actual needs - not a generic checklist.

Your Current Situation

CURRENT IT PROVIDER	CONTRACT END DATE
Provider name	Month / Year
NOTICE PERIOD	**MONTHLY IT SPEND**
e.g. 90 days	£ per month
NUMBER OF USERS	**NUMBER OF LOCATIONS**
Approx. headcount	Offices / sites
INTERNAL IT TEAM?	**CLOUD SERVICES USED**
Yes / No / Partial	e.g. Microsoft 365, Azure...

Business Priorities

- ☐ Cost reduction
- ☐ Cyber security
- ☐ Business growth
- ☐ AI adoption
- ☐ Cloud migration
- ☐ Compliance
- ☐ Remote working
- ☐ Digital transformation

GROWTH PLANS (NEXT 3 YEARS)

e.g. New office, acquisition, international expansion, headcount growth...

CURRENT FRUSTRATIONS WITH IT

e.g. Slow response times, poor communication, lack of proactive advice...

Notes

BUYER TIP Share this completed page with every provider you meet. It saves time and quickly reveals which providers listen carefully and tailor their response.

SECTION 03

Which Type of Provider Fits?

There is no universally "best" IT provider. Different types of providers are built to serve different business priorities. Understanding what you actually need is the first step to narrowing down your options.

The "Keep the Lights On" Provider

Focuses purely on fixing things when they break. Low cost, but highly reactive.

- Lowest monthly cost
- Basic helpdesk support
- Little to no strategic advice

The Security Specialist

Prioritises cyber security and compliance above all else. Often more expensive and rigid.

- High security maturity
- Strict governance
- Less flexible for users

The Strategic Partner

Balances support, security and strategic planning to actively enable business growth.

- Proactive management
- Technology roadmaps
- Higher overall value

The Co-Managed Provider

Designed to work alongside your existing internal IT team rather than replace them.

- Escalation support
- Specialist project delivery
- Shared tooling

BUYER TIP Be honest about what you are willing to pay for. If you only want basic reactive support, a strategic partner will feel too expensive. If you want business transformation, a low-cost provider will constantly disappoint you.

SECTION 04

Small, Medium or Large?

The size of the IT provider you choose should roughly align with the size and complexity of your own business. Medium-sized providers are often the best fit for organisations between 50-500 users, combining specialist expertise with flexibility.

Capability	Small Provider Under 15 staff	Medium Provider 50-150 staff	Large Provider 500+ staff
Monthly Cost	Lowest	Moderate	Highest
Flexibility & Agility	★★★★★	★★★★★	★★★★★
Personal Relationship	★★★★★	★★★★★	★★★★★
Breadth of Expertise	★★★★★	★★★★★	★★★★★
Cyber Security Maturity	★★★★★	★★★★★	★★★★★
AI Capability	★★★★★	★★★★★	★★★★★
Governance & Process	★★★★★	★★★★★	★★★★★
Strategic Planning	★★★★★	★★★★★	★★★★★
Service Stability	★★★★★	★★★★★	★★★★★

BUYER TIP

Many businesses assume that as they grow, they should move to a much larger IT provider. It's an understandable thought: "We're a more mature business now, so we need a more serious provider." In reality, bigger doesn't automatically mean better. Smaller IT providers often excel at personal service and flexibility, but as your business grows they may struggle to keep pace with increasingly complex security, compliance, projects, AI initiatives or around-the-clock support. At the other end of the scale, very large providers have mature processes and broad capabilities, but those processes are designed to work consistently across hundreds or thousands of customers. Smaller clients are often expected to adapt to the provider's way of working, with less flexibility and fewer bespoke arrangements. For many organisations, particularly those with around 50–500 users, the best fit is often a well-established medium-sized provider—large enough to offer specialist expertise and long-term capability, yet small enough to remain responsive, adaptable and invested in your success. The goal isn't to choose the biggest provider you can afford. It's to find the provider whose scale, capabilities and way of working are the best match for your business over the next five years.

SECTION 05

Questions Every Provider Should Answer

Do not let the provider control the entire narrative during meetings. Use these practical questions to dig beneath the sales pitch and uncover how they actually operate day-to-day.

Support & Operations

- [ ] When we call for support, do we speak directly to an engineer or a call logger?
- [ ] What is your average response time for critical priority issues?
- [ ] How do you handle staff onboarding and offboarding securely?
- [ ] Do you outsource your out-of-hours support to a third party?

Cyber Security

- [ ] Are you ISO 27001 certified, and is the certificate in your own name?
- [ ] How often do you proactively review our Microsoft 365 security posture?
- [ ] What happens if we suffer a ransomware attack at 2am on a Sunday?
- [ ] Do you provide staff security awareness training as standard?

Strategy & Technology

- [ ] How do you help us build an IT budget for the next three years?
- [ ] Can you show me an example of a technology roadmap you built for a client?
- [ ] How are you currently helping clients adopt AI tools like Microsoft Copilot?

Proactivity

- [ ] How do you actively monitor and patch our infrastructure against vulnerabilities?
- [ ] Can you demonstrate your device monitoring and management capabilities?

BUYER TIP

You don't need to be a technical expert to ask these questions. Just listen to whether the answers sound credible, and ask them to **demonstrate** their claims. If their answer is vague or they can't show you, their offer is weak. Also, it's better to find a provider whose standard way of working aligns with your needs, rather than asking them to build a highly bespoke service just for you - that rarely works as intended.

SECTION 06

What Good IT Support Looks Like

Great support is about choice and speed. Your staff should be able to raise issues in the way that suits them best, and those issues should be routed to the right expert immediately. Modern IT support should also leverage AI to enhance operations without forcing staff into frustrating bot loops.

Direct Phone	**Email Support**
Client Portal	**Live Chat / Teams**

- **Escalation:** Can staff escalate tickets themselves, or do they have to wait?
- **Call-backs:** If staff are busy, can they book a convenient time for an engineer to call back?
- **AI-operations:** Is support enhanced by AI, or are staff forced to talk to bots with no human escape hatch?

1. User reports issue → 2. Direct to Engineer → 3. Rapid Resolution → 4. Root Cause Analysis

BUYER TIP **Ask who actually answers the phone.** Many providers use a "first-line dispatch" model where the person answering the phone cannot actually fix the problem - they just log a ticket. You want a provider where you speak directly to an engineer who can start fixing the issue immediately.

SECTION 07

Reactive vs Proactive

Almost every IT provider claims to be "proactive". But true proactive management requires significant investment in tooling, automation, and dedicated staff whose only job is to prevent problems before they occur.

The Reactive Cycle

Problem Occurs

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User Experiences Downtime

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User Reports Issue

↓

Engineer Fixes Issue

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Repeat Process

The Proactive Approach

Continuous Monitoring

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System Identifies Trend

↓

Engineer Resolves Root Cause

↓

Failure Prevented Entirely

↓

Continuous Improvement

- ✓ Automated patch management
- ✓ Regular security posture reviews
- ✓ Ticket trend analysis
- ✓ Hardware lifecycle planning
- ✓ User experience monitoring
- ✓ Monthly strategic recommendations

BUYER TIP Prevention almost always delivers better long-term value than rapid reaction. A provider who fixes a server in 10 minutes is good; a provider who patches and maintains the server so it never breaks in the first place is excellent.

SECTION 08

Transparency Matters

> **"If you can't see how your IT provider is performing, how do you know you're receiving a good service?"**

Trust is built on transparency. A premium IT provider will give you complete visibility into your systems, their performance, and your security risks - without you having to ask for it.

Client Visibility Dashboard

99.9%	14m	98/100
SYSTEM UPTIME	AVG RESOLUTION TIME	SECURITY SCORE

You should expect to see: Critical metrics will depend on the type of service you need. Here are some typical metrics to look for:

Devices & Staff

- Device Security & Age
- AV / Patching Status
- Cloud & Public Identity Security
- IT Risky behaviours
- Staff satisfaction

ITIL & Ops

- Incident & Problem Management
- Change Management
- Security Operations
- Vulnerability Management
- Project Management & Risk Register

Cloud

- Office365 Licensing
- Azure Logs
- Microsoft Service Performance
- DMARC & Email Security
- Cloud Security

BUYER TIP Ask every shortlisted provider for a demonstration of their real-time dashboard. If they can only provide a static monthly report with a list of closed tickets, they are reactive. If they can demonstrate real-time visibility into security recommendations, budget forecasts, and user training gaps, they are a strategic partner.

SECTION 09

IT Strategy & Roadmaps

Technology changes constantly. Without planning, businesses naturally fall behind, accumulating technical debt and security vulnerabilities. A good IT provider must have a structured process to align technology with your business objectives. The IT strategy should be understandable by a non-technical audience, as sign-off is normally a board decision. You don't want to be receiving statements-of-work randomly throughout the year. Most businesses want predictability, so an IT strategy is critical.

Audit & Assess	Stabilize	Cloud Migrations	AI Readiness	Transformation
Month 1	Month 3	Month 6	Year 1	Year 2+

Areas you ideally want to see within an IT strategy:

- Business goals (underpins the strategy)
- Security/Risks
- Asset life-cycle
- Staff training
- Technology stack (aligning with partners)
- Service Improvements (continuous)
- Licenses/subscriptions

BUYER TIP Good providers explain *why* recommendations matter to your business outcomes, not just *what* hardware you need to buy.

SECTION 10

Certifications That Matter

Modern regulations and cyber security expectations continue to evolve rapidly. It is increasingly important to choose a provider that keeps up with changing standards and can help you navigate them. Look beyond the logo wall for meaningful certifications.

ISO 27001

The international standard for information security management. Proves they take data protection seriously.

Cyber Essentials Plus

A UK Government-backed scheme. The 'Plus' means their security controls have been independently verified.

Microsoft Solutions Partner

Demonstrates verified technical capabilities and successful project delivery within the Microsoft ecosystem.

Staff Background Checks

Ensure that the engineers accessing your highly sensitive business data have been properly vetted.

Industry Awards

Independent recognition of service excellence and innovation within the managed IT services sector.

BUYER TIP Always check if the ISO 27001 certificate is held by the IT provider as a whole business. Some providers hold accreditation only for a specific part of their operation, which may not cover the team or systems that will be managing your account.

SECTION 11

Avoid Bespoke Complexity

Many SMEs unintentionally request highly customised support arrangements. Customisation sounds attractive, but it often creates operational complexity. When engineers have to remember unique processes for your business, consistency suffers and mistakes increase.

Standard Service Model		Highly Bespoke Service
Standardised Tooling		Unique Software Agents
Automated Processes	VS	Manual Workarounds
Consistent Engineer Training		Reliance on "One Guy Who Knows"
Fast, Reliable Resolution		Slower, Error-Prone Support

Instead of trying to force a provider to work exactly the way you do today, look for a provider whose standard service model naturally aligns with how you *want* to work in the future.

BUYER TIP Unless your organisation is very large (typically 1,000+ users with dedicated service management), heavily bespoke support models are rarely beneficial. Embrace standardisation for better reliability.

SECTION 12

Looking Beyond Today

Accept there is no "perfect" IT provider and some compromises often need to be made by both partners. The best relationships are when both parties work on the relationship to achieve better outcomes. Your next IT provider should still be the right provider for you in five years. Consider your future needs and ensure the provider has the scale and expertise to support your growth.

- [ ] Significant headcount growth
- [ ] Mergers and acquisitions
- [ ] Advanced cloud adoption (Azure/AWS)
- [ ] Increasing cyber security maturity
- [ ] Opening new office locations
- [ ] International expansion
- [ ] Adopting Artificial Intelligence
- [ ] Stricter industry compliance

SECTION 13

Planning Your Transition

Provider Selection & Due Diligence
Review proposals, check references, select partner.

Notice Period & Planning
Serve notice to current provider. Begin transition planning.

Knowledge Transfer (2-4 Weeks)
New provider audits systems and documents networks.

Parallel Running & Go Live
Tools deployed alongside old provider, followed by switchover.

30-Day Review
Post-onboarding review to resolve any lingering friction.

SECTION 14

Provider Evaluation Scorecard

Use this grid during supplier meetings to score providers objectively out of 5 across key criteria.

Evaluation Criteria	Provider A	Provider B	Provider C
Responsiveness & Support Quality	/5	/5	/5
Communication & Transparency	/5	/5	/5
Cyber Security Maturity	/5	/5	/5
Strategic Guidance & Roadmaps	/5	/5	/5
AI & Cloud Capability	/5	/5	/5
Governance & Certifications	/5	/5	/5
Value for Money	/5	/5	/5
Overall Confidence	/5	/5	/5
TOTAL SCORE	**/40**	**/40**	**/40**

Meeting Notes

SECTION 15

About Wavex

Wavex provides premium managed IT services for ambitious organisations seeking more than just basic IT support. We partner with businesses that demand responsive support, proactive management, robust cyber security, and clear technology strategy.

We believe that transparency is a core principle of a successful IT partnership. Our clients receive clear, unvarnished visibility into service quality, security risks, and continual improvement recommendations through our proprietary APEX platform.

Whether you need fully managed IT, co-managed support alongside your internal team, or strategic AI enablement, Wavex provides the governance and expertise to ensure your technology drives your business forward.

Further Reading

If you found this workbook helpful, we recommend exploring these additional resources to support your IT decision-making process:

- → Hidden Risks of Reactive IT Managed Services
- → Which IT Outsourcing Model Is Right For Your Business?
- → Co-Managed IT Services - Supporting Internal IT Teams
- → Cyber Essentials v3.3 Changes - Don't Fail Certification
- → SME Governance - Why Technology Projects Fail
- → How to Create an IT Tender Document
- → How Much Should IT Cost? A Finance Director's Guide

FINAL NOTE By the end of this workbook, you should feel significantly more confident in selecting the right IT provider. Remember that choosing an IT partner is a long-term strategic decision, not simply a monthly cost comparison. Good luck.