

How to Select an SMB IT Consultant



25 Questions to ask about:

[The Relationship](#)
[Reputation](#)
[Experience](#)
[Value](#)
[Service](#)
[Competence](#)
[Retail Technology](#)

The Relationship

1. **Are you happy** with your current IT services company or resource?

Ask yourself this simple question at the beginning of a search for an outsourced IT resource or if you're working with an internal IT department or team where a "build or buy" decision is under consideration. Don't fix what's not broken, but if you're the slightest bit unhappy or concerned about how IT support works inside your company, here are a few more questions that will help you find the best possible IT partner.

2. **Do you like them** (management and the engineers that work on your account)?

Nobody wants to work with a grouch or someone who can't communicate well. Look for an SMB IT consultant that is pleasant to deal with personally and professionally. Don't overlook intangibles, such as the consultant's motivation, attitude, honesty, ability and culture fit.

Reputation

3. Are they **recognized by major OEMs** as a top-tier IT provider?

If software and hardware manufacturers like Microsoft, HP or Xerox think highly of the IT consultant, then you can bet they are competent and well-trained. Look for credentials that include Microsoft Partner of The Year, 200 [Top Microsoft Partners](#), Cloud Specialist, Premier Partner, etc. Numerous IT partner recognition awards indicate a high level of competence.

4. Are they **recognized by the IT industry**?

Ascertain the expertise and desire on the part of the SMB IT consultant to provide industry leadership by examining their trade and peer awards like the MSPmentor Global Ranking of [Top Managed Services Providers](#) and membership in professional organizations.



Experience

5. Do they **understand your business** problems?

Look for an IT partner that has in-depth experience in your specific industry. Experienced doctors can listen to you talk about the symptoms and then provide the correct diagnosis and treatment. Good SMB IT consultants should be able to swiftly grasp work processes and information flow, identify issues or bottlenecks, and quickly recommend an effective and affordable solution.

6. Do they have **satisfied customers** that are businesses like yours?

All IT consultants can provide a couple of references. Ask them to give you the contact information of long-term customers so you can verify the level of satisfaction yourself. Review their [customer case studies](#) as well.

Value

7. Do they offer **predictable IT costs** that include unlimited IT support for a fixed, monthly fee?

It's easy to compare typical IT consultant hourly rates by making a few calls. However, what's more difficult to identify is how many hours a project or repair takes. If you elect to hire an IT consultant by the hour, they should be able to give you a cost range or examples so you're not completely surprised by the invoice.

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The best way to hire professional IT services is with an all-you-can-eat, [flat monthly fee IT support](#) contract. This approach generates predictable IT costs and no surprises. Quality IT services for small businesses are more cost-effective and predictable than relying on the boss's nephew.

8. Will they provide a free or low cost **network audit and assessment**?

IT professionals have tools that can quickly evaluate your network and zero in on what's wrong. Don't spend more money on diagnosing problems than solving them.

9. Do they offer **financing** for equipment and software?

Payment and financing options often make possible an investment in revenue generating technology that otherwise is out of reach. A professionally run IT business will have a number of options available.

10. Do they recommend **solutions that have a specific ROI**?

Given the right information, almost all IT solutions can be monetized. Empirical knowledge is hard to come by, but reasonable assumptions can help determine the ROI of IT investments. If anti-spam software will speed the review of email by 15-30 minutes each day, the ROI to an office of 20 people is significant. Ask the IT consultant to help you identify and calculate the potential ROI of proposed solutions.



11. Will they **lower your total cost of ownership (TCO)** and or help control your costs?

You want to purchase IT professional services that provide the best value: the quality of service or product compared to the cost. Ask for bottom line evidence that the proposed IT solutions will save you money by saving time, reducing maintenance or avoiding problems.

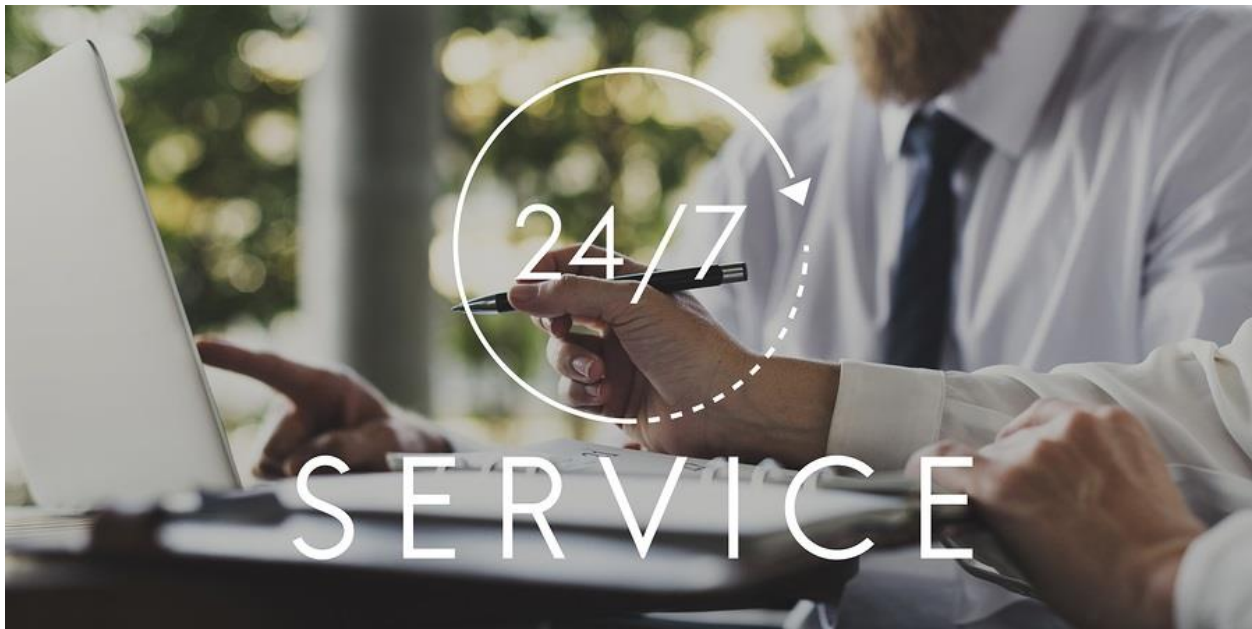
12. Have they demonstrated how to be **more productive? Better connected? More secure?**

Demonstrated means customer success stories, industry trends, research data or test results. Some IT consultants can create a test environment or pilot project to simulate the results of a specific hardware or software solution before deployment. Depending on the IT problem being addressed, you may get an opportunity to test-drive the solution without actually installing the technology.

13. Will the proposed business IT services give you a **competitive advantage?**

Technology is a tool to help create a competitive advantage, grow revenues and impact your bottom line. Ask your IT professional how to best utilize the technology that's been deployed in your business. Just because you have Windows 10 or use [Office 365](#) doesn't mean you know how to maximize its potential. The right tools and the right knowledge will create a competitive advantage and increase revenue.

Service



14. Is your IT support resource **available 24x7?**

Most businesses need [24x7 IT support](#) coverage. If you have a website, it needs to be always up. Network support, desktop support, security monitoring or server support may be needed at any time. So, ask yourself, "What KIND of coverage is available?" Great coverage consists of around the clock

monitoring and repair of problems; even better, some SMB IT consultants have the tools to “anticipate” and fix IT issues before they cause damage or downtime.

15. Does your IT provider **guarantee response times**?

A good IT consultant measures support staff performance and will guarantee response times. Ask them to share their track record or proof of how they have taken care of customers. When your network or computers are broken or down, you’re out of business or, at the very least, crippled in terms of workflow and productivity. Response time is down time.

16. Do they provide both on-site and **remote diagnosis and repair**?

Remote computer services are faster and costs less than onsite visits by an IT support technician. A professional SMB IT consultant should have both onsite and remote IT support capabilities. Various tools available today make remote trouble-shooting easy. If the IT professional doesn’t have remote IT technical support capability, they are not technically qualified to help your business.

17. How do they **track customer satisfaction**?

How they track customer satisfaction indicates the level of competency and professionalism. If they don’t systematically track it, then ask yourself if you want to do business with them. If they do track it, dig deep into what that means and how they do it.

Tip: Customer satisfaction monitoring is often integrated into the IT consultant’s trouble-ticketing system. Ask to see it in action.

18. Do they have a sophisticated **job-tracking system**?

A job-ticketing or tracking system is a must for an SMB IT consultant and its customers. It automates and tracks each support request so that issues don’t fall between the cracks. It’s rare, but some SMB IT consultants have the trouble ticket system tied into a monitoring system that can be viewed real-time by employees.

19. Do they have a **rapid response** team or solution?

Downtime can be fatal to a business. A rapid response from your computer support provider can reduce the costs and impact of a disabled website or enterprise system. Ask about escalation policies and how problems will be fixed and by whom.

20. Are they committed to **customer education**?

Full-spectrum service includes training customers to use IT systems software and hardware. In-depth training, when required, may best be handled by vendors or accredited trainers referred but not typically employed by the SMB IT consultant.



Competence

21. Are they **IT security experts**?

A security breach or [ransomware attack](#) can devastate a company in a few days. Check for the security certifications held and training completed by both the IT support technicians and the business. Make sure you know about both types.

22. Are they up-to-date with **cloud, IoT and mobile technologies** and the latest technology advancements?

Information technology is changing daily. [Cloud services](#) and Internet of Things (IoT) options and devices provide exciting opportunities for moving the business forward. If they don't keep up with the latest technologies, you may end up with an obsolete or less-than-optimal solution.

SMB IT consultants should also be leaders in implementing mobile and tablet solutions for business. Freeing employees from their desks, registers and vehicles increases productivity and enhances customer service. Ask them to show you how.

IT companies should master innovations by using the technology first to run their own businesses or in a test environment.

23. Do they **continually train** their technicians and maintain current credentials?

Great SMB IT consultants invest in their personnel to stay current on OEM and vendor certifications and training. Technology is changing so rapidly that outdated training means that you'll likely pay for their inability to solve IT problems quickly, if at all.

24. Do they have effective and **affordable disaster recovery** solutions?

Disaster recovery, or business continuity, cannot be ignored. Failure to find an appropriate solution could risk your business. A competent IT professional will help you create a [disaster recovery plan](#) and provide a variety of options including cloud storage and backup for an effective and affordable disaster recovery solution.

25. Are they **green**?

IT solutions that support a better, healthier environment are a priority for a lot of businesses. New technologies are constantly appearing that reduce the carbon footprint of computers and networks. Your IT consultant should be able to address these issues as well.



Bonus Section – Retail Technology

26. Do they specialize in technology for smaller retailers and retail chains?

Retailers have special requirements for IT, including [PCI compliance](#), EMV systems, [mobile POS](#), ecommerce, guest Wi-Fi, [payment automation](#) and merchant services. A suitable SMB IT consultant for retailers will offer complete, one-stop retail technology solutions.



27. Do they understand how to leverage technology to increase traffic and sales?

From wireless systems that also function as traffic counters to digital marketing experts, it's rare to find an SMB IT consultant that also provides revenue-enhancing retail technologies and services like EMV deployment strategies.

The best ones offer [digital marketing services](#) like search engine optimization (SEO), email marketing and automation, comprehensive analytics, digital ads with real-time bidding, and search engine marketing. New technologies such as social data collection and auto-replenishment should also be in their solution set.

28. Are they recognized as the top vertical market MSP in the retail category?

Very few SMB IT consultants have achieved this level of recognition as a [retail technology leader](#).



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