

IT Outsourcing Due Diligence Checklist

Most organisations are reliant on an effective IT function to keep them operational and to deliver service.

This comprehensive checklist will guide you as you look to choose an IT service provider that is appropriate for the specific needs of your organisation.



STEP

1

Understanding your business needs

Establishing your needs early on will help you save time, ensure a more structured process and should help you find an IT partner that is a good fit. Once you have completed the 10 questions in this step, you will be better placed to make a shortlist of IT providers that you feel could serve and fulfil your specific needs and requirements.

1

What is the scope of work that you would like to outsource?

You may want to outsource the entirety of your IT, or just sub elements of it.



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How much are you paying for IT Services currently?

Note all IT related costs including salaries, hardware purchases, backups, Internet connectivity, communication costs etc.



3

What is your IT budget?

Having already established the total cost of your IT delivery, you can now set a budget and use it as a benchmark for proposals. Buying purely based on cost can be a mistake, so make sure you are comparing apples to apples and look to buy on value.



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Why are you looking to outsource your IT?

Know what you are looking to achieve. IT may be a distraction from your core business, for example, or your team may be being held back or IT may be costing too much.



5

Are you looking to reduce risk?

Identify your risk and seek out an IT partner with experience dealing with said risk. For example, if you're worried about needing an engineer onsite quickly, you should seek out IT Support companies that are local and can respond in a timely manner.

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Do you need 24x7 or out-of-hours support?

Applicable if your business operates out-of-hours or 24x7. Examples are if your business is a hotel, a restaurant or if you work in multiple geographies and time zones.

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Determine the kind of IT support that you feel that you need?

That could include any of the following:

- | | |
|---|---|
| <input type="checkbox"/> 24x7 Service Desk Support | <input type="checkbox"/> Network Support |
| <input type="checkbox"/> 24x7 Network Monitoring | <input type="checkbox"/> IT Strategy |
| <input type="checkbox"/> IT Service Delivery Management | <input type="checkbox"/> IT Projects |
| <input type="checkbox"/> Proactive IT Support | <input type="checkbox"/> IT Security |
| <input type="checkbox"/> Remote IT Support | <input type="checkbox"/> Managed Cloud |
| <input type="checkbox"/> Onsite IT Support | <input type="checkbox"/> Cyber Security |
| <input type="checkbox"/> Out of Hours IT Support | <input type="checkbox"/> Communication |
| <input type="checkbox"/> Dedicated Service Desk | <input type="checkbox"/> Compliance Support |

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Do you require expertise in specific technology?

If you rely on particular applications or technology, it would be useful for your new IT Support provider to have experience dealing with those applications or solution, or at least have the capability to up-skill quickly.

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What industry vertical are you in?

You may wish to seek out an IT provider that has experience working with businesses within your vertical or similar verticals where skills are transferable.

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Do you require your IT provider to have any specific certifications?

You may require your IT partner to hold recognised industry accreditations to either ensure quality or to meet your compliance needs. An example is ISO 27001.

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STEP
2

Data Gathering

This step requires you to look into your shortlisted IT providers and to get in touch with them. Some of the questions can be answered by looking at the IT provider's website. Even if the information you are looking for is on their website, it is always recommended that you ask the provider during your early engagement in order to see how they answer and get their responses directly.

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Have they supported a similar company to yours before?

If they have supported a similar company, be that size, industry, location, need etc, then they will most likely have a good understanding of your needs. This is also the perfect opportunity to ask them about the list of risks you noted down in question 5.

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Have they worked with the same or similar technology vendors?

If they have experience with vendors and applications that you use, they will most likely be able to support you and your technology stack better.

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Do they have any relevant case studies that they can share with you?

Providing you with case studies can give you an insight into what type of services the IT provider has successfully delivered, giving you a grasp of their capabilities and ways of working. This is especially true if they offer you a case study relevant to your vertical.

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How do they deliver their IT support?

Understand how they deliver support to their multitude of customers and make sure that you are comfortable with their service delivery model. Will you have a small team who you will get to know and who will know both you and your technology? Will you be competing for attention and support with potentially much bigger organisations who may take priority as they spend more?

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Will you enjoy a director-led relationship?

Having a director-led relationship means that you will have access to senior leaders who will understand your needs and will more easily be able to adapt service to those needs. They will also be empowered to act and ensure service standards remain high.

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What is the worst disaster that they have faced with one of their clients in the past?

This will show you how resilient the IT Support provider is and how they deal with pressing issues. It will also highlight any key learnings and steps they may have taken to improve for the future.

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Do they have customer service policies in place to ensure your team's satisfaction?

Most IT Support providers will have customer service policies. The key is to discover what those are and ask how the IT support provider measures customer service. This will help ensure that they align with your business and team needs.

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Do they have adequate insurance?

Every IT Support company should have professional indemnity insurance covering a minimum of £1m. In the unlikely event that an incident occurs where your IT partner is at fault, you can be reassured that you could make a claim for damages.

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Do they have certifications you listed in question 10?

At this stage, you actively make sure that the IT Support provider has the certifications you need from an IT partner.

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Do they provide services directly, or do they outsource any of their support?

Some IT Support companies offshore or nearshore their help desk support to cope with demand and drive down costs. It is important that you are comfortable with the service on offer, understand where your privileged data is being shared, understand the qualifications of any third parties and ensure there are no language issues.

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Do their IT engineers receive regular training?

Having regularly trained IT professionals will help ensure that you receive better IT support. It also demonstrates a commitment to continual learning and best practice.

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What are their standard response times?

Make sure you know and are comfortable with service response times and make sure that they either meet or can be adapted to meet your business needs.

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Is there an up-to-date knowledge-base where engineers will be able to find information about you and your technology, as well as solutions to common issues?

Make sure that your IT provider has a living document where they store key information about your people, systems and setup, as well as common issues and solutions. This helps speed up response and resolution times, improving service.



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What vendors does the IT provider partner with?

Which vendors does the IT provider partner with and do they match with your needs. By having a formal relationship with that vendor, the IT provider will be able to offer you more effective third party management and service.



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Do they understand PCI and GDPR compliance?

All of the IT provider's actions have security implications and they have a responsibility to keep your systems and data secure. That is why understanding PCI if you take payments should be a requirement, as is GDPR compliance for any organisation.



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How many engineers do they have?

Make sure that they have a large enough team in relation to their customer numbers to provide you with excellent service. If they have a smaller team or a large number of customers relative to each team member, you know service will be impacted.



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What is their customer retention rate from the last 6 years?

Knowing their customer retention rate will give you a better idea of how good the company is at meeting their SLAs and ensuring the satisfaction of their customers.



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What was their most recent complex onboarding and what made it complex?

The objective of this question is to find out how the IT provider will onboard you while mitigating risk. It will also give you an insight into how they approach your relationship and how thoroughly they document your environment.



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Are they ISO 27001 accredited?

ISO 27001 provides a framework of policies and procedures that includes all legal, physical and technical controls involved in an organisation's information risk management processes. With data and data privacy being so important, most companies require IT support providers to have an ISO 27001 accreditation today.



30

Are they a CiSP member?

The Cyber Security Information Sharing Partnership (CiSP) is a joint industry and government initiative set up to exchange cyber threat information in real time, in a secure, confidential and dynamic environment. Being a member shows they take security seriously and are aware of current cyber security threats.

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What is their employee turnover rate?

If companies have a high turnover rate, that may mean that they are not a good employer, don't have a happy team and it potentially means a lack of continuity for you. They may also be distracted by HR matters and inducting new team members.

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How long have their senior engineers and their management team been working at their company?

If their senior engineers and management team have worked for the company for a long time, that usually means that the culture within the company is positive and they are doing interesting, challenging work. A good work environment and good people more often than not means improved service delivery and greater satisfaction for you.

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Can you visit their office?

Visiting their office will really give you a better idea of what their company culture is like, how many engineers they actually have and overall how friendly and approachable they are. It will also demonstrate their investment in technology, their team and show you what 'normal' service looks like. If it is a chaotic, unstructured, noisy environment then your support may be impacted.

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Do they have any social events where they invite clients?

Sometimes IT Support companies like to host social events and invite their clients in order to help build rapport. It helps with putting faces to names and helps build relationships. For example, we like to invite you to our premises for a pizza night at the start of our partnership so that you can get to know our team and enjoy an informal environment to get to know you better and talk about your needs and goals.

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Do they have social media pages?

Social media can give you an important insight into the company, their team and their activities. This will give you an opportunity to put faces to the business entity and also give you insight into their values.

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Testimonials and References

STEP 3

The purpose of this step is to acquire customer reviews and references of your shortlisted IT Support companies. This is an opportunity to really understand what their customers think about them and how they have helped them achieve their objectives. In the IT support world, it is perfectly normal for companies to ask if they can speak to the IT Company's customers in order to gain a reference. We strongly encourage you to speak with our existing customers so that you can get a better understanding about us and our brand of service delivery from an independent voice.

36

Do they have any customer testimonials that they can share with you?

Seeing what their customers have to say about them will give you a better idea of how good the company and service is. This is especially true if the testimonials are from a company that is similar to yours in terms of size, industry, location or need.



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Could they provide 2 or 3 customers that you are able to speak with?











Asking to speak to one of their customers is perfectly normal, after all, you want to make sure you make the right decision and who better to ask than their customers?

Once you get a chance to speak to their customers, ask them the following questions:

- ✦ **How has this IT provider helped you achieve your business objectives?**
You want to find out if the IT provider has actually impacted the company positively and helped them achieve their objectives.
- ✦ **Has your support with them been seamless?**
Successful IT Support translates into a seamless IT Support experience. You will want to know what hiccups they faced together and how they were overcome these issues.
- ✦ **How long have you been with them?**
This question will tell you if it's a new customer or if it's a customer that has been with them for a while.
- ✦ **Overall, how has your experience with them been?**
This is an open answer question, the objective is for them to tell you about any negative experience they've had with this IT provider.



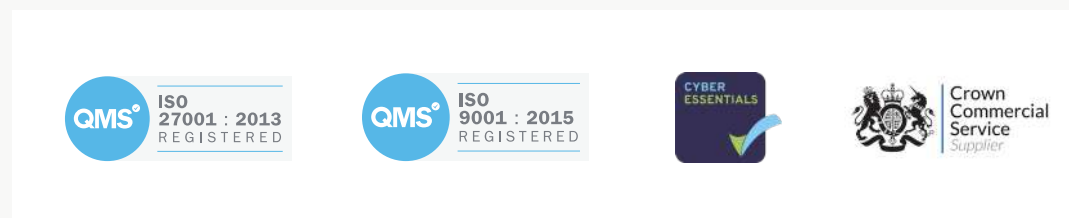
Why Cardonet

 TRUE 24X7 OPERATIONS	 PROVEN TRACK RECORD	 SINGLE POINT OF CONTACT	 VENDOR NEUTRAL	 CUSTOMER FOCUSED
 PASSIONATE & EXPERIENCE	 TRUSTED PARTNER	 FOCUSSED ON QUALITY	 AGILE AND AWARE	 FULLY ACCOUNTABLE

Awards









Accreditations



Our Commitments

<h3>Our Team</h3> <p>We employ friendly professionals who have well-rounded experience, the ability to work in a team and a desire to be helpful.</p>	<h3>Our Processes</h3> <p>We continue to invest in our systems and have the standards in place for effective, streamlined and consistent service, customised to meet your needs.</p>	<h3>Our Mission</h3> <p>We are dedicated to providing remarkable IT services that improves your performance, increases your productivity and protects you.</p>	<h3>Our Promise</h3> <p>We value long-term relationships built on trust. To achieve that, we deliver fully supported vendor neutral solutions that are essential and reasonably priced.</p>
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Your IT Services Partner for

 IT Support	 IT Consultancy	 Managed IT	 Managed Cloud	 Communication	 Cyber Security
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Outsource your IT to a trusted expert with extensive experience

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