

Finding the right IT partner for your business

ITS Brief – framework to IT success series

IThinkSource has provided this brief to assist you in the management of your firm's technology infrastructure. If you have any questions or would like further assistance, please reach out to us at your convenience (www.ithinksource.com). IThinkSource is a full service, professional, technology support firm providing technology support and guidance to our clients in Orange County. *Legal notice: The contents of this brief provide general guidance on specific technology related topics, always have your technology plans reviewed by a professional before implementation.*

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Finding the right IT partner for your business is crucial for ensuring smooth operations and leveraging technology effectively. Here are some steps you can take to find the best fit:

- 1. Define Your Needs:** Clearly outline what you need from an IT partner. Do you need help with network security, software development, infrastructure management, or something else?
This is a very important task, we devoted an entire brief to this topic. See "Understand your technology infrastructure" brief, available for download on our site www.ithinksource.com/itsbriefs.
- 2. Research:** Look for IT companies or freelancers that specialize in the services you require. You can use online directories, referrals from colleagues, or search engines to find potential partners.
- 3. Check Credentials:** Review the credentials, certifications, and experience of each potential partner. Look for evidence of successful projects similar to yours.
- 4. Read Reviews/Testimonials/Client References:** Check reviews and testimonials from previous clients to gauge the quality of service and

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customer satisfaction. Even better, ask for client references and contact them for a brief discussion regarding their IT experience.

5. **Interview Potential Partners:** [Develop your IT partner evaluation sheet \(see process below\)](#). Schedule meetings or calls with the IT companies or freelancers you're considering ([you may want to provide your evaluation sheet to the potential partner prior to your meeting/call](#)). Ask about their approach to solving your specific challenges, their availability, and how they communicate with clients.
6. **Discuss Pricing:** Define your IT budget, then get a clear understanding of their pricing structure. Make sure there are no hidden costs and that the services offered fit within your budget.
7. **Evaluate Compatibility:** Consider the compatibility of your company culture and values with the IT partner. You'll be working closely with them, so it's important to have good chemistry.
8. **Review Contracts Carefully:** Before signing any contracts, review them carefully to ensure all terms and conditions are favorable to your business.
9. **Start with a Trial Project:** Consider starting with a small project or trial period to assess the IT partner's capabilities and compatibility before committing to a long-term partnership.
10. **Stay Flexible:** Keep in mind that finding the right IT partner may take time. Be patient and flexible in your search process.

IT partner evaluation sheet.

Using the questions/criteria below as a draft list, go through and revise the list to match your IT needs and infrastructure. This is your master list you will utilize to evaluate IT service providers.

1. Needs/requirements List:

- Based on item 1 above, summarize your technology needs into a simple needs/requirements list. Have your prospective IT partner

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comment on their ability to support each component of your infrastructure.

- Identify **key elements** of this list, these are your “must have” items/requirements.

2. Expertise and Experience:

- Firm's years in business.
- Review track record and client testimonials.
- Provide any specialization in relevant industries or technologies.
- Qualify the partner has experience with your defined **key elements**.
- Any partnerships with major technology vendors?
- Gather feedback from existing clients on technical knowledge.
- Ability to onboard new clients with no impact/risk to operations.

3. Service Offerings:

- Review list of services provided. Compare to your summarized technology needs list.
- Check support for both on-premise and cloud-based systems.
- Verify ability to handle hardware procurement.
- Assess options for project-based work.
- Check their support for any specialized software applications.
- Verify disaster recovery and backup solutions/capabilities.
- Verify flexibility/capability for future service expansions.

4. Response Time and Availability:

- Check guaranteed response times outlined in SLAs.
- Verify availability/process of off hours support.
- Assess procedures for escalating urgent issues.
- Verify geographic proximity for onsite support.
- Check redundancy in support resources.
- Verify remote support capabilities.

5. Scalability:

- Assess experience with businesses of various sizes.

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- Verify ability to scale resources based on demand.
 - Check flexibility in service agreements.
 - Verify access to a large pool of qualified technicians.
 - Assess availability of additional services.
 - Verify tools and processes for rapid expansion.
 - Assess experience with mergers and acquisitions.
 - Check options for phased implementations.
 - Review track record of supporting growth phases.
- 6. Service Level Agreements (SLAs):**
- Verify clearly defined response times.
 - Check guaranteed uptime percentage.
 - Assess procedures for reporting and escalating issues.
 - Review flexibility to customize SLAs.
 - Check alignment with industry best practices.
- 7. Client References and Reputation:**
- Gather contact information for client references.
 - Assess length of relationships with existing clients.
 - Check testimonials highlighting strengths.
 - Gather feedback from industry peers.
- 8. Security Measures:**
- Review recommended security policies and procedures.
 - Verify compliance with industry standards.
 - Assess regular security audits and assessments.
 - Check capability to use of encryption and data protection measures.
 - Verify monitoring tools for cyber threats.
 - Assess partnerships with cybersecurity vendors.
- 9. Communication and Reporting:**
- Verify frequency and format of status updates.
 - Check accessibility of support staff.
 - Assess online portals or dashboards availability.

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- Review capability for regularly scheduled meetings.
- Check proactive communication about maintenance.
- Assess options for real-time communication.
- Assess responsiveness to inquiries or requests.

10. Cost and Value:

- Review pricing structures and options.
- Assess value-added services included.
- Identify any cost-saving measures recommended.
- Review billing cycles and payment terms.
- Assess overall value proposition.

11. Cultural Fit:

- Verify alignment of values and mission statements.
- Assess compatibility of work styles.
- Verify shared understanding of business goals.
- Assess willingness to collaborate and share knowledge.
- Check openness to feedback.
- Assess history of successful collaborations.

12. Differentiator:

- What are your key areas of strength that differentiate the firm from other firm's offerings?

Summary

By following these steps, you can find an IT partner that aligns with your technology requirements and business goals. The result, an IT partner that can help you succeed in today's digital landscape.

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