The Modern MSP Blueprint: Evaluating Your Business Evolution Readiness

This assessment tool helps Managed Service Providers (MSPs) evaluate their current capabilities and identify opportunities for evolution into a Next-Generation MSP. As client environments become increasingly complex and the market more competitive, MSPs must evolve beyond traditional service offerings to remain relevant and grow profitably.

This comprehensive assessment framework evaluates your organization across five critical dimensions of MSP transformation to help you benchmark your current capabilities, identify gaps, and prioritize investments that will accelerate your evolution toward becoming a Next-Gen MSP.

HOW TO COMPLETE YOUR MSP TRANSFORMATION ASSESSMENT

Overview

This assessment evaluates your organization across five key dimensions of MSP transformation:

1. Hybrid infrastructure capabilities
2. AI, data integrity, and innovation readiness
3. Customer retention through service excellence
4. Tool rationalization
5. Co-managed services

ASSESSMENT PROCESS

STEP 1: Answer individual questions

For each dimension, you'll find a series of detailed questions grouped into categories. Rate each question using our 5-level maturity scale:

LEVEL	DESCRIPTION	SCORE
Level 1	Not started/Ad hoc	**1 point**
Level 2	Early development	**2 points**
Level 3	Defined process	**3 points**
Level 4	Managed and measured	**4 points**
Level 5	Optimized/leading practice	**5 points**

STEP 2: Calculate dimension scores

After rating all questions within a dimension:

1. Add up the scores for each category within the dimension
2. Record the category subtotals in the scoring section
3. Calculate the total dimension score

> **Example for hybrid infrastructure:**
> - Data management: _____ / 15 points
> - Cloud transformation: _____ / 15 points
> - Service evolution: _____ / 15 points
> - Total dimension score: _____ / 45 points

STEP 3: Determine overall maturity

1. Add up all five dimension scores
2. Calculate your maturity percentage:
   (Total Score ÷ 220) × 100
3. Use the maturity framework to identify your current level

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Tips for accurate assessment

- Be honest in your evaluations—this tool is meant to help identify areas for improvement
- Consider gathering input from multiple team members for a more complete perspective
- Document specific examples that support your ratings
- Use the detailed descriptions in each level to guide your scoring

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DIMENSION 1: Hybrid infrastructure capabilities

Ask yourself the following questions:

Data management

- Hybrid data flows: How seamlessly do you manage cross-environment data movement?
- Workflow efficiency: How optimized are processes across distributed assets?
- Service integration: How well do your services connect hybrid components?

Cloud transformation

- Modernization: How mature is your application modernization practice?
- Cost optimization: How effectively do you manage cloud economics?
- Migration expertise: How refined is your cloud transition methodology?

Service evolution

- Innovation: How advanced are your digital transformation offerings?
- Portfolio management: How current is your service catalog?
- Future readiness: How systematically do you track emerging tech demands?

Score calculation:
Add ratings (max 45 points)

Data Management:
_____ / 15

Cloud Transformation:
_____ / 15

Service Evolution:
_____ / 15

Total: _____ / 45

DIMENSION 2: AI, data integrity, and innovation readiness

Ask yourself the following questions:

Data foundation

- Data consolidation: How unified is your operational data across systems?
- Metrics reliability: How consistently can you validate data accuracy?

Strategy & resources

- AI differentiation: How clearly does AI enhance your service offerings?
- Automation maturity: What percentage of routine operations are automated?
- Resource allocation: Do you have dedicated AI/ML expertise and budget?
- Market alignment: How well do your AI capabilities match client expectations?

Implementation & ROI

- Customer impact: How measurably does AI improve client outcomes?
- Innovation: What is your capability for custom AI solution development?
- Value tracking: How effectively do you measure AI investment returns?

Score calculation:
Add ratings (max 45 points)

Data Foundation:
_____ / 10

Strategy & Resources:
_____ / 20

Implementation & ROI:
_____ / 15

Total: _____ / 45

DIMENSION 3: Customer retention through service excellence

Ask yourself the following questions:

Relationship health
- Client longevity: How long do your client relationships typically last?
- Profitability trends: How do you track profitability growth in existing accounts?
- Retention metrics: What are your current net and gross retention rates?

Value demonstration
- Experience measurement: How do you measure customer satisfaction and experience?
- Customer perspective: How do your customers measure your efficacy?
- Impact tracking: How do you quantify value delivery to long-term clients?

Growth strategy
- Opportunity execution: How effectively do you execute cross/up-sell opportunities?
- Service evolution: How do you identify and address service gaps?

Score calculation:
Add ratings (max 45 points)

Relationship Health:
_____ / 15

Value Demonstration:
_____ / 15

Growth Strategy:
_____ / 10

Total: _____ / 45

DIMENSION 4: Tool rationalization

Ask yourself the following questions:

Utilization
- Feature usage: What percentage of each tool's capabilities do you use?
- Tool efficiency: How many tools are required for core functions?
- Environment alignment: How aligned are your internal and client-facing tools?

Productivity impact
- Context switching: How do you measure tool switching overhead?
- Workflow efficiency: What workflows require multiple tool interactions?
- Team performance: How do you track team productivity?

Strategic value
- Consolidation: What is your tool consolidation strategy?
- ROI tracking: How do you measure tool stack ROI?
- Service enablement: How well do your tools enable service delivery?

Score calculation:
Add ratings (max 45 points)

Utilization:
_____ / 15

Productivity Impact:
_____ / 15

Strategic Value:
_____ / 15

Total: _____ / 45

DIMENSION 5: **Co-managed services**

Ask yourself the following questions:

Partnership framework
- Domain clarity: How clearly are operational responsibilities defined?
- Team collaboration: How effective is your collaboration with internal IT teams?
- Change control: What change management controls are in place?

Operational excellence
- Workflow efficiency: How efficiently do you manage team handoffs?
- Response management: How well do you adapt SLAs for co-managed services?
- Value tracking: How do you measure shared responsibility outcomes?

Enterprise readiness
- Tool support: What enterprise-grade tools can you support?
- Compliance: How well do you integrate with client security frameworks?
- Team capability: How prepared are your teams for enterprise partnerships?
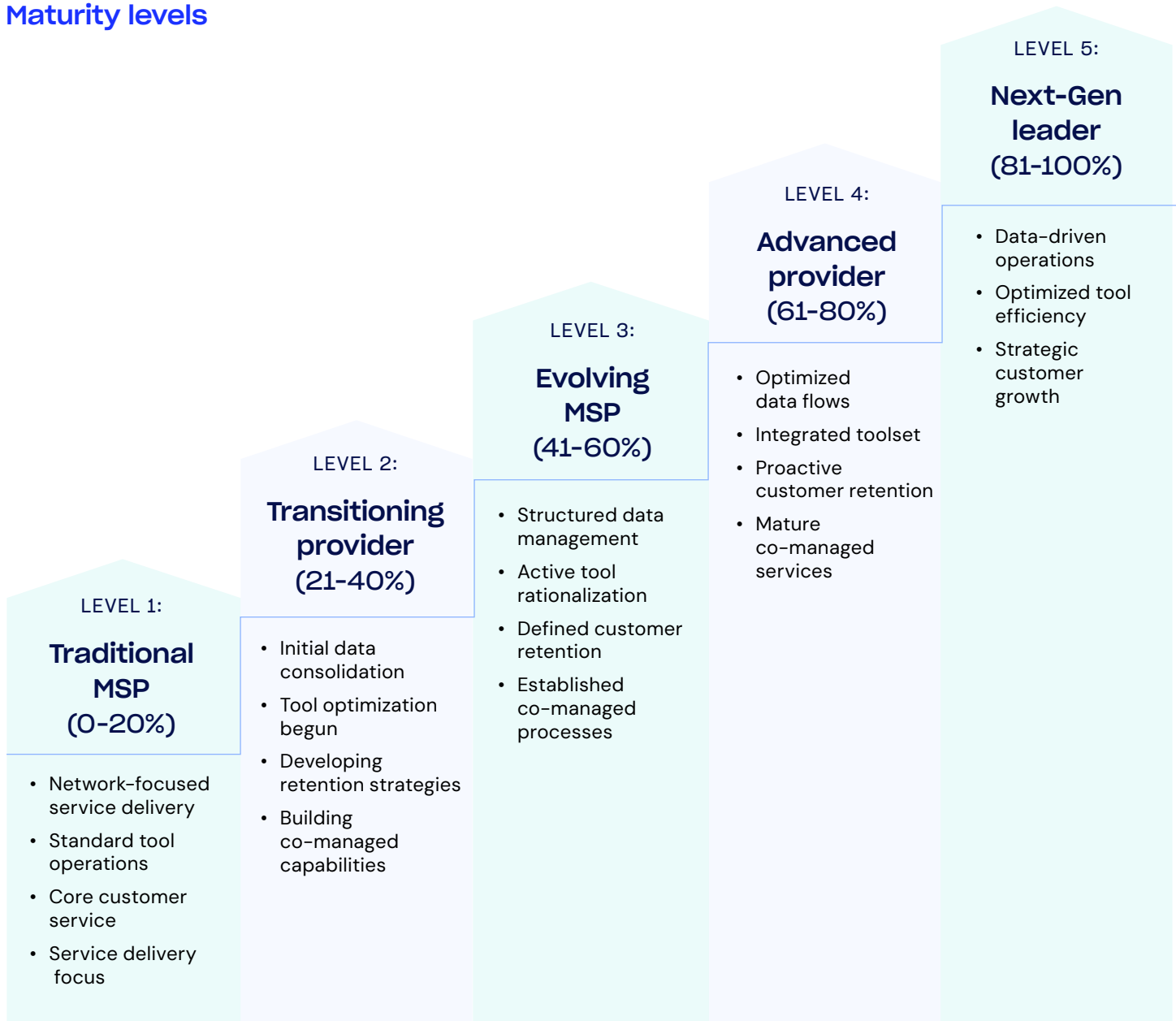
Score calculation:
Add ratings (max 45 points)

Partnership Framework:
_____ **/ 15**

Operational Excellence:
_____ **/ 15**

Enterprise Readiness:
_____ **/ 15**

Total: _____ **/ 45**

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Maturity levels

LEVEL 5:

Next-Gen leader (81-100%)

- Data-driven operations
- Optimized tool efficiency
- Strategic customer growth

LEVEL 4:

Advanced provider (61-80%)

- Optimized data flows
- Integrated toolset
- Proactive customer retention
- Mature co-managed services

LEVEL 3:

Evolving MSP (41-60%)

- Structured data management
- Active tool rationalization
- Defined customer retention
- Established co-managed processes

LEVEL 2:

Transitioning provider (21-40%)

- Initial data consolidation
- Tool optimization begun
- Developing retention strategies
- Building co-managed capabilities

LEVEL 1:

Traditional MSP (0-20%)

- Network-focused service delivery
- Standard tool operations
- Core customer service
- Service delivery focus

Turn your assessment into action

Now that you've completed the assessment let our MSP experts help you analyze your results, identify your biggest growth opportunities, and build your practical transformation roadmap.

LET'S GET STARTED

About LogicMonitor®

LogicMonitor® offers AI-powered data center transformation. The company's SaaS-based platform, LM Envision, enables observability across on-prem and multi-cloud environments. A Visionary on the 2024 Gartner Magic Quadrant for Observability, LogicMonitor provides IT and business teams operational visibility and predictability across their technologies and applications to focus less on troubleshooting and more on delivering extraordinary employee and customer experiences. For more information, visit www.logicmonitor.com and our blog, or follow us on LinkedIn, X, Facebook, and YouTube.