Managed Services Client Evaluation Form

ninjaOne

Is this client a good candidate for a fixed-fee managed services offering

General

Client's IT maturity	○ Low	○ Med	○ High
Client's dependency on network stability/data security and integrity	○ Low	○ Med	○ High

Access requirements

Will client allow us to be sole solution provider managing their network?	○ Yes	○ No
Will client grant exclusive administrator-level access to all managed devices, applications, and network resources?	○ Yes	○ No
Will client assist in initial baseline assessment by providing access to key systems and personnel?	○ Yes	○ No
Will client allow remote access to servers and devices (unattended)?	○ Yes	○ No
Will client allow remote access to desktops (attended and unattended)?	○ Yes	○ No
Does client have high-speed Internet service for all remote support and maintenance?	○ Yes	○ No

Warranty and licensing requirements

Does client have extended warranty coverage on all current hardware devices?	○ Yes	○ No
Does client have current and supported software licensing?	○ Yes	○ No

Resource requirements **What is the client currently using**	Existing model / solution	Willing to convert to our standard?	
Firewall(s)	_____	○ Yes	○ No
Endpoint protection (Antivirus / Anti-malware)	_____	○ Yes	○ No
Email security (anti-spam / filtering)	_____	○ Yes	○ No
Backup solution (local)	_____	○ Yes	○ No
Backup solution (offsite)	_____	○ Yes	○ No