

# MSP Vendor Evaluation Checklist



Before we jump in, there are clear things to look out for when evaluating vendors...



## Green Flags

Transparent communication

Free trial access

Clear support processes

MSP-focused operations

Honest conversations about limitations

Strong peer recommendations



## Red Flags

Aggressive sales tactics

No trial at all

Poor support responsiveness

Vague AI/data policies

Long contracts without flexibility

"Too good to be true" promises





Step 1

# Define your needs



Step 2

skip ahead →

# Do your research



Step 3

skip ahead →

# Make your decision

# Define your needs

- ✓ Identify the specific problem you're trying to solve
- ✓ List your "must-have" features
- ✓ List your "nice-to-have" features
- ✓ Identify dealbreakers or missing functionality you cannot compromise on
- ✓ Determine who internally will own implementation
- ✓ Estimate how much time your team can realistically dedicate to onboarding

Before you step onto a trade show floor or book a demo, get clear on what problem you're actually trying to solve. Knowing your **must-haves**, **nice-to-haves**, and **dealbreakers** helps you avoid getting swept up in conference hype or flashy sales pitches.



# Do your research

Not every vendor is built the same, and not every product is the right fit for your MSP. **Talk to peers, read reviews, ask hard questions, and take advantage of trials** to understand how a vendor actually operates beyond the sales process.

## VENDOR RELATIONSHIP & TRUST

### Authenticity & Transparency

- Does the vendor feel authentic and trustworthy?
- Are they transparent about limitations?
- Do they answer difficult questions directly?
- Do they genuinely try to understand your business?
- Do they make you feel heard during conversations?

### Community Reputation

- Ask peers if they've worked with the vendor
- Check MSP community groups for feedback
- Request customer references or case studies
- Look for long-term customer relationships
- Evaluate whether the vendor participates in the MSP community

### Tips for avoiding "conference hype" decision-making:

- Don't buy solely based on booth experience
- Don't confuse excitement with operational need
- Revisit your acceptance criteria after the event
- Compare multiple vendors before deciding
- Give your team time to evaluate post-conference

# Do your research

## PRODUCT

### Functionality

- Does the product solve your actual problem?
- Does it integrate with your existing stack?
- Is the UI intuitive for your team?
- Can your technicians realistically support it?
- Does it reduce operational burden or add complexity?

### Trial Access

- Is there a free trial available?
- Can you fully test the product before committing?
- Are there onboarding resources during the trial?
- Can you validate workflows with real-world use cases?

## SECURITY & COMPLIANCE

### Security Questions

- Is the vendor SOC 2 certified?
- Can they explain their security controls clearly?
- Do they have a documented incident response process?
- What data do they store?
- Who has access to customer data?

*continued*

# Do your research

## S&C...

### AI & Data Usage

- Does the product use AI?
- Is customer data sent to third-party AI models?
- Is customer data used for AI training?
- Is there a documented AI usage policy?
- Are privacy policies publicly available?

## PRICING & CONTRACTS

### Billing Structure

- Understand the billable unit (user, mailbox, endpoint, etc.)
- Confirm how billing scales
- Review invoicing frequency
- Ask about minimum commitments

### Contract Review

- Review contract term length carefully
- Understand cancellation policies
- Confirm renewal terms
- Check for automatic renewals
- Ask if pricing can increase during the agreement
- Have legal counsel review the agreement

# Do your research

## Vendor Support

- Is support easy to contact?
- Are support expectations clearly documented?
- Is there a dedicated partner success/contact person?
- Do they offer implementation assistance?
- Is support handled directly or outsourced?

## MSP-Focused or Enterprise-Focused?

- Is the company built specifically for MSPs?
- Or are MSPs just an add-on channel?
- Do pricing, support, and packaging align with MSP operations?
- Do they understand multi-tenant environments?

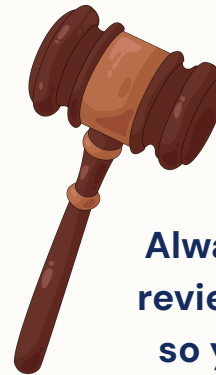


# Make your **decision**

Before committing, ask yourself:

- Would I trust this company during a major outage?
- Are they solving a problem, or are they selling to me?
- Can my team realistically implement and manage this?
- Does this improve outcomes for our clients?
- Would I feel comfortable recommending this vendor to another MSP?

Once you've evaluated your options, choose the vendor that best aligns with your business goals, operational needs, and long-term growth. The **right partnership** should feel less like a transaction and more **like an extension of your team**.



**Always have a lawyer review your contracts so you don't end up with a surprise later on.**

**Phin Security** is a security awareness training and email security platform that makes the needs of MSPs the core of their product. Phin rejects the notion that SAT has to be boring, useless, and a time consuming compliance checkbox. They go beyond the bare minimum to help MSPs increase efficiency, security, and the value they provide to their customers, while decreasing workload. MSPs have a strong voice in product development, ensuring the tool works for them — not the other way around.



## Evaluating security awareness training?

Use this **Buyer's Guide**.

[Download Now](#)

[phinsecurity.com](https://phinsecurity.com)

# Good luck

on your search for the right vendor.  
If you need help, you know where to find us!

**Traceless** is an AI-powered business communications cybersecurity company that protects organizations against social engineering, AI-driven voice attacks, identity fraud, and data exfiltration. Traceless secures the human layer of enterprise security — the phone calls, chats, emails, and tickets where most breaches actually begin — through three core capabilities:

---

**TRACELESS**

[Learn More](#)

[traceless.com](https://traceless.com)

- **Traceless Verify** — On-demand, one-touch identity verification for both internal and external interactions.
- **Traceless Data** — Encrypted, expiring links for sharing sensitive information without leaving persistent exposure in email, chat, or ticket logs.
- **Traceless Protect** — An agentic AI layer that detects and enforces data security policies in real time across communication platforms.