

Cybersecurity Partner Onboarding Checklist for MSPs

Use this checklist to evaluate potential MSSP partners with clarity and confidence, ensuring the collaboration genuinely supports your business goals and client security needs.

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Pre-Partnership Evaluation

1. Identify Key Services

- ☐ SOC-as-a-Service capabilities
- ☐ Vulnerability assessments
- ☐ Penetration testing
- ☐ Endpoint protection
- ☐ Compliance consulting
- ☐ Incident response
- ☐ Verify if services are in-house or outsourced
- ☐ Review service delivery methodologies
- ☐ Confirm alignment with client environments

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2. Research Reputation & Reliability

- ☐ Read independent reviews
- ☐ Check industry recognition/awards
- ☐ Contact current/former clients for references
- ☐ Verify SLA compliance history
- ☐ Review client retention rates
- ☐ Confirm 24/7 support availability
- ☐ Request case studies of real-world scenarios

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Verify Certifications & Compliance

1. Individual Certifications:

- ☐ CEH (Certified Ethical Hacker)
- ☐ OSCP (Offensive Security Certified Professional)
- ☐ CISSP (Certified Information Systems Security Professional)

2. Organizational Credentials:

- ☐ ISO/IEC 27001
- ☐ SOC 2
- ☐ CREST accreditation

3. Compliance Framework Support:

- ☐ HIPAA
- ☐ GDPR
- ☐ PCI-DSS
- ☐ Other relevant frameworks

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Assess Your Current Capabilities

- ☐ Document existing in-house services
- ☐ Identify capability gaps
- ☐ Define areas needing support vs. duplication -
- ☐ Prepare operational requirements list

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Partnership Planning

1 Determine Scalability Requirements

- ☐ Confirm ability to support additional clients
- ☐ Review tiered service level options
- ☐ -Verify modular service flexibility
- ☐ Test capacity for growth (5-50+ clients)

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Clarify Pricing Models

- ☐ Understand pricing structure (flat-rate/per-user/usagebased/tiered)
- ☐ Review tiered service level options
- ☐ Define what's included vs. add-ons
- ☐ Clarify emergency support fees
- ☐ Review back-to-back billing options
- ☐ Negotiate flexible payment terms

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Establish SLAs

- ☐ Define response time requirements
- ☐ Set resolution targets
- ☐ Classify incident priority levels
- ☐ Establish metric tracking/reporting methods
- ☐ Align with client requirements
- ☐ Include white-label service considerations

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Draft Termination Clauses

- ☐ Set notice periods
- ☐ Define offboarding support requirements
- ☐ Establish data handling obligations
- ☐ Review financial penalties for early exit
- ☐ Ensure flexibility for business changes
- ☐ Implementation Setup

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Establish Communication Processes

- ☐ Set regular check-in schedule
- ☐ Configure shared dashboard access
- ☐ Assign dedicated account manager
- ☐ Define incident escalation paths
- ☐ Secure after-hours/emergency contacts
- ☐ Establish proactive reporting cadence

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Evaluate Tools & Integration

- ☐ Test tool compatibility with existing systems
- ☐ Review interface usability
- ☐ Verify centralized monitoring capabilities
- ☐ Confirm automated reporting features
- ☐ Assess data sharing capabilities
- ☐ Schedule technical onboarding/training

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Conduct Pilot Testing

- ☐ Define limited scope pilot project
- ☐ Test endpoint monitoring
- ☐ Run vulnerability assessments
- ☐ Evaluate responsiveness
- ☐ Review reporting quality
- ☐ Assess collaboration ease
- ☐ Identify integration issues

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Success Measurement - Set Success KPIs

➤ 1. Operational Metrics:

- ☐ Response times
- ☐ Incidents detected
- ☐ Average resolution time
- ☐ System uptime

➤ 2. Strategic Metrics:

- ☐ Compliance support effectiveness
- ☐ Client satisfaction scores
- ☐ Partnership ROI
- ☐ Service quality improvements

➤ 3. Post-Launch Review:

- ☐ Schedule quarterly KPI reviews
- ☐ Plan metric adjustments for evolving threats
- ☐ Maintain partnership accountability
- ☐ Document lessons learned

Partnership Success Tip: Remember, we're stronger together. The right MSSP partnership should feel like an extension of your team, where your success drives our mutual success.

Contact us today!



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