dijital team

A readiness assessment for MSPs

The MSP Centralised Services Readiness Checklist

Assess your operational maturity. Identify inefficiencies. Unlock better margins.

Where does your MSP sit today?

Reactive	Developing	Proactive
0–39%	40–69%	70–100%

32	8	100	10–15
statements	categories	point score	minutes

Are you building a proactive MSP, or just getting better at resolving tickets?

For many Managed Service Providers (MSPs), growth means more customers, more endpoints, more support tickets and, ultimately, more engineers.

But the most scalable MSPs approach service delivery differently.

Rather than simply becoming more efficient at resolving support tickets, they invest in preventing unnecessary incidents, standardising customer environments and automating repetitive work.

This is where Centralised Services can make a significant difference.

A mature Centralised Services function helps MSPs reduce reactive support, improve engineer productivity, strengthen customer experience and increase service gross margins.

The question is: How proactive is your MSP today?

This assessment will help you understand where your business stands across eight critical areas of Centralised Services maturity and identify the improvements that could deliver the greatest operational and financial return.

What you'll discover

By completing this assessment, you will:

01 Evaluate your MSP's proactive service delivery maturity

02 Identify gaps in monitoring, maintenance, standardisation and automation

03 Understand where preventable incidents may be consuming engineering capacity

04 Benchmark your internal practices against a structured maturity framework

05 Receive a practical improvement roadmap based on your results

06 Identify opportunities to increase scalability and profitability

Time required: 10–15 minutes
Assessment: 8 categories, 32 questions, score out of 100

How to use this checklist

Part 1	Part 2	Part 3	Part 4	Part 5
Score the 32 statements	Calculate your readiness score	Follow the roadmap for your stage	Plan your three biggest opportunities	Estimate what it could be worth

Score each statement from 0 to 4

For each statement, select the response that best reflects how consistently the capability operates across your managed customer environments.

0	**Not in place**	We don't currently have this capability or process
1	**Ad hoc**	We do this occasionally, inconsistently or only for certain customers
2	**Established**	We have a documented process that is implemented across most relevant environments
3	**Managed**	The process is consistently followed, measured and actively managed
4	**Optimised**	The capability is automated where appropriate, continually improved and delivers measurable business outcomes

Score each statement from 0 to 4.

Each category has a maximum of 16 points. Because there are eight categories, the maximum raw score is 128.

Your readiness score

(Your total points ÷ 128) × 100

Round to the nearest whole number to calculate your readiness percentage.

A worked example

1. You score statement 1.1 as **3**, 1.2 as **2**, 1.3 as **1** and 1.4 as **2**. Your RMM standardisation score is 3 + 2 + 1 + 2 = **8 / 16**.
2. You add up all eight category scores and get **80 / 128**.
3. 80 ÷ 128 × 100 = 62.5, which rounds to **63%**. That puts your MSP in the **Developing** stage (40–69%).

Fill it in on screen or on paper

This PDF is a form. Click a score for each statement, tick off your 90-day goals and type straight into the boxes, then save it. In Adobe Acrobat or Acrobat Reader, your category scores, total, readiness score and stage fill in automatically. In other PDF apps, add up your scores and type them in. Prefer paper? Print it and circle your answers.

0 Not in place | 1 Ad hoc | 2 Established | 3 Managed | 4 Optimised | Click or circle one score per statement

01

RMM standardisation and management

Category score ☐ / 16

Are your RMM tools delivering a consistent, scalable service across your customers?

Your Remote Monitoring and Management (RMM) platform should be one of the most valuable operational tools in your MSP. However, inconsistent configurations, outdated scripts and customer-specific variations can significantly reduce its effectiveness.

		0	1	2	3	4
1.1	We have documented standard RMM policies and configurations for each relevant class of managed device.	0	1	2	3	4
1.2	RMM agents, policies and configurations are consistently deployed and maintained across applicable customer environments.	0	1	2	3	4
1.3	We regularly review and remove outdated scripts, policies, monitoring configurations and unnecessary exceptions.	0	1	2	3	4
1.4	We actively measure RMM compliance, configuration consistency and opportunities for platform optimisation.	0	1	2	3	4

Why it matters: Consistent RMM configurations make customer environments easier to support, reduce administrative effort and create the foundation for effective proactive maintenance and automation.

02

Monitoring and alert management

Category score ☐ / 16

Are you proactively identifying meaningful issues, or generating unnecessary tickets?

Poorly configured monitoring can flood the service desk with low-value alerts. A mature Centralised Services function ensures monitoring identifies genuine operational risks while minimising unnecessary human intervention.

		0	1	2	3	4
2.1	We have documented monitoring standards and alert thresholds appropriate to different device and service types.	0	1	2	3	4
2.2	Alerts are consistently classified, prioritised and routed according to business impact and operational requirements.	0	1	2	3	4
2.3	We regularly review monitoring noise, duplicate alerts, false positives and unnecessary ticket generation.	0	1	2	3	4
2.4	Known conditions are automatically remediated where safe and appropriate, with verification and escalation when remediation fails.	0	1	2	3	4

Why it matters: Effective monitoring reduces unnecessary engineering effort while helping ensure genuine customer-impacting issues are identified and resolved promptly.

0 Not in place | 1 Ad hoc | 2 Established | 3 Managed | 4 Optimised | Click or circle one score per statement

03

Patch management and proactive maintenance

Category score ☐ / 16

Are your customer environments being maintained proactively and consistently?

Patch management and proactive maintenance should be structured, repeatable and measurable rather than driven by individual engineers or customer incidents.

		0	1	2	3	4
3.1	We have documented patching and maintenance policies covering supported operating systems, applications and infrastructure.	0	1	2	3	4
3.2	Patching is centrally managed, with approved deployment schedules, testing and appropriate maintenance windows.	0	1	2	3	4
3.3	Failed updates, non-compliant devices and maintenance exceptions are automatically identified and tracked through resolution.	0	1	2	3	4
3.4	We measure patch compliance, recurring failures and maintenance effectiveness across managed environments.	0	1	2	3	4

Why it matters: Consistent proactive maintenance can reduce avoidable incidents, improve security and extend the capacity of the service desk.

04

Recurring incident analysis and problem management

Category score ☐ / 16

Are you fixing the root causes of problems or repeatedly resolving the same issues?

One of the greatest opportunities to reduce service desk workload is to identify recurring incidents and permanently eliminate their causes.

		0	1	2	3	4
4.1	We regularly analyse PSA ticket data to identify recurring incidents, problematic devices and customers generating excessive support demand.	0	1	2	3	4
4.2	We have a documented Problem Management process for investigating recurring or high-impact incidents.	0	1	2	3	4
4.3	Root cause investigations result in assigned corrective actions that are tracked through implementation.	0	1	2	3	4
4.4	We measure the reduction in recurring incidents and engineering hours resulting from permanent fixes.	0	1	2	3	4

Why it matters: Preventing recurring incidents is often more financially valuable than repeatedly resolving them faster.

0 Not in place | 1 Ad hoc | 2 Established | 3 Managed | 4 Optimised | Click or circle one score per statement

05

Automation maturity

Category score ☐ / 16

How much repetitive engineering work have you eliminated?

Automation can transform service delivery economics, but only when it is implemented systematically and linked to measurable business outcomes.

		0	1	2	3	4
5.1	We maintain a prioritised backlog of automation opportunities based on frequency, engineering effort, complexity and business impact.	0	1	2	3	4
5.2	We have automated suitable repetitive activities such as user administration, routine maintenance, ticket management or endpoint remediation.	0	1	2	3	4
5.3	Our automation workflows have defined ownership, security controls, error handling, testing and ongoing maintenance procedures.	0	1	2	3	4
5.4	We measure automation effectiveness, engineering hours released and the financial or operational return generated.	0	1	2	3	4

Why it matters: Automation helps MSPs create capacity for growth without requiring engineering headcount to increase at the same rate as customer demand.

06

Documentation and technology standardisation

Category score ☐ / 16

Can your MSP support customer environments consistently without relying on individual engineers?

Inconsistent technology environments and outdated documentation increase support costs, slow troubleshooting and make automation more difficult.

		0	1	2	3	4
6.1	We have documented standard technology stacks, configurations and operational requirements for relevant customer environments.	0	1	2	3	4
6.2	Customer infrastructure, configuration and operational documentation is centrally maintained and regularly reviewed.	0	1	2	3	4
6.3	Changes to supported systems and configurations are reflected in documentation and monitored for compliance with standards.	0	1	2	3	4
6.4	We actively identify technology exceptions, configuration drift and opportunities to simplify customer environments.	0	1	2	3	4

Why it matters: Standardisation enables repeatable service delivery, faster troubleshooting, more effective automation and reduced dependence on individual employees.

0 Not in place | 1 Ad hoc | 2 Established | 3 Managed | 4 Optimised | Click or circle one score per statement

07

Operational ownership and accountability

Category score ☐ / 16

Who is responsible for making your service desk less busy?

Proactive service delivery requires dedicated ownership. Without it, maintenance, automation and continuous improvement often become tasks engineers complete only when they have spare time.

		0	1	2	3	4
7.1	We have clearly defined responsibility for Centralised Services, proactive maintenance and RMM optimisation.	0	1	2	3	4
7.2	Dedicated engineering capacity is allocated to proactive activities and protected from routine reactive service desk demands.	0	1	2	3	4
7.3	We have documented procedures covering maintenance, monitoring, automation, escalation and operational changes.	0	1	2	3	4
7.4	Centralised Services performance and improvement priorities are reviewed regularly by operational leadership.	0	1	2	3	4

Why it matters: Proactive improvement requires clear accountability and protected capacity. Without ownership, reactive support will continually take priority.

08

Financial reporting and continuous improvement

Category score ☐ / 16

Can you demonstrate the financial value of proactive service delivery?

Centralised Services should contribute to stronger operational performance and improved profitability. MSPs need the right reporting to understand whether this is happening.

		0	1	2	3	4
8.1	We regularly measure support tickets, engineering effort and cost per managed user or endpoint.	0	1	2	3	4
8.2	We track trends in recurring incidents, automated remediation, proactive maintenance and engineering capacity.	0	1	2	3	4
8.3	We can estimate the financial impact of proactive improvements through reduced labour effort, avoided costs or additional delivery capacity.	0	1	2	3	4
8.4	Operational improvement priorities are linked to service gross margin, customer satisfaction and long-term business objectives.	0	1	2	3	4

Why it matters: A mature MSP measures proactive operations not simply by tasks completed, but by their contribution to customer experience, scalability and financial performance.

Your MSP Centralised Services scorecard

Transfer your scores from each category into the table below.

01	RMM standardisation	/ 16
02	Monitoring and alert management	/ 16
03	Patch management	/ 16
04	Recurring incident analysis	/ 16
05	Automation maturity	/ 16
06	Documentation and standardisation	/ 16
07	Operational ownership	/ 16
08	Financial reporting	/ 16
	Total	/ 128

Your Centralised Services readiness score

Total score ÷ 128 × 100 = % **Your stage**

What does your score mean?

0–39%
Reactive

Your MSP relies heavily on reactive service delivery and has significant opportunities to improve standardisation, proactive maintenance and operational ownership.

40–69%
Developing

Your MSP has established elements of proactive service delivery, but inconsistent processes, fragmented automation or limited accountability may be preventing you from realising the full benefits.

70–100%
Proactive

Your MSP has established a strong foundation for proactive operations, standardisation and automation. The opportunity is to optimise performance, strengthen financial measurement and drive continuous improvement.

Stage 1 · Score 0–39%

Reactive. Build the foundations.

Your current position

Your MSP may be spending too much engineering time responding to incidents, troubleshooting recurring problems and performing repetitive maintenance activities.

Monitoring, documentation and technology standards may differ between customers, while proactive improvement depends on individual engineers finding spare time.

As the customer base grows, engineering workload may increase at a similar rate, placing pressure on profitability.

Your priorities

1 Establish operational ownership

Appoint an individual responsible for proactive maintenance, RMM standardisation and continuous improvement.

This does not necessarily require hiring someone immediately, but ownership and dedicated time must be established.

2 Standardise your RMM

Audit existing RMM policies, monitoring configurations and scripts.

Create a consistent operational baseline across supported customers and devices.

3 Identify your biggest sources of reactive work

Analyse at least three months of PSA tickets and identify the ten most common recurring incidents or repetitive support activities.

Calculate the engineering effort associated with these issues.

4 Improve monitoring and maintenance

Review noisy alerts, duplicate monitoring events, patch failures and common maintenance exceptions.

Focus on correcting the causes of unnecessary workload.

5 Implement your first automations

Select two or three low-risk repetitive processes that can be standardised and automated.

Measure the engineering time saved.

Your first 90 days

By the end of the first 90 days, aim to have:

- [ ] A clearly identified Centralised Services owner
- [ ] Documented minimum RMM and monitoring standards
- [ ] A baseline of ticket volumes and recurring incidents
- [ ] A prioritised list of proactive improvement opportunities
- [ ] At least two tested automation or remediation workflows
- [ ] A monthly Centralised Services performance review

Your objective

Move from a reactive service desk to a business with an identifiable, measurable proactive operations function.

Stage 2 · Score 40–69%

Developing. Build consistency and scale.

Your current position

Your MSP has already implemented elements of proactive service delivery.

You may have standard RMM policies, some automation, established maintenance procedures and engineers who undertake Centralised Services activities.

However, these capabilities may not be consistently applied across all customers, while reporting and ownership can remain fragmented.

The challenge is moving from individual operational improvements to a structured and repeatable Centralised Services function.

Your priorities

1 Dedicate Centralised Services capacity

Ensure proactive maintenance and automation have allocated engineering capacity that is protected from routine service desk interruptions.

2 Expand technology standardisation

Identify exceptions across customer environments and develop a programme to reduce unnecessary variation.

3 Establish a structured automation programme

Move away from isolated scripts and individual workflows towards a prioritised automation roadmap with documented ownership, testing and performance measurement.

4 Introduce Problem Management

Create a formal process for identifying and eliminating recurring incidents.

Assign corrective actions and measure the resulting workload reduction.

5 Connect operational KPIs to financial performance

Begin reporting on engineering hours per managed user, preventable incidents, cost per ticket and the capacity released through proactive improvements.

Your first 90 days

By the end of the first 90 days, aim to have:

- [ ] Dedicated Centralised Services engineering capacity
- [ ] A documented proactive maintenance schedule
- [ ] Consistent core RMM policies across relevant environments
- [ ] A prioritised automation backlog with clear ownership
- [ ] Recurring incident analysis incorporated into management meetings
- [ ] A monthly scorecard measuring operational and financial improvements

Your objective

Turn individual proactive initiatives into a structured Centralised Services operating model that consistently improves efficiency.

Stage 3 · Score 70–100%

Proactive. Optimise for margin and maturity.

Your current position

Your MSP has established strong proactive service delivery capabilities.

Standardisation, automation, monitoring and proactive maintenance are embedded within daily operations, while continuous improvement has clear ownership.

Your opportunity is to further optimise operational efficiency and demonstrate how proactive service delivery contributes to customer experience, capacity and profitability.

Your priorities

1 Optimise your automation portfolio

Review existing workflows, identify duplication and improve the efficiency and reliability of automation across your technology stack.

2 Introduce predictive operational insights

Use historical ticket data, device health information and recurring incident trends to identify problems earlier and prioritise proactive remediation.

3 Measure financial ROI

Track the engineering capacity released through Centralised Services and determine how it contributes to avoided recruitment, additional revenue capacity or reduced operating costs.

4 Strengthen customer experience

Use operational insights in QBRs to demonstrate reductions in incidents, improved environment health and the commercial value of proactive IT management.

5 Build a continuous improvement culture

Ensure Service Desk Managers, Centralised Services Engineers and technical leaders collaborate to continuously identify and eliminate unnecessary work.

Your first 90 days

By the end of the first 90 days, aim to have:

- [ ] A documented Centralised Services performance dashboard
- [ ] An automation ROI reporting framework
- [ ] Measurable targets for reducing preventable engineering workload
- [ ] A regular review of recurring incidents and automation opportunities
- [ ] Operational improvement insights incorporated into customer QBRs
- [ ] A 12-month roadmap for proactive service delivery improvement

Your objective

Build a service delivery model that supports customer growth without technical delivery costs increasing at the same rate as revenue.

Your three biggest opportunities

Now that you've calculated your overall readiness score, review your scores across the eight categories. Your lowest-scoring areas are likely to highlight important improvement opportunities.

> However, before prioritising a category, consider the business impact of the underlying issues. A weakness that creates a significant security or operational risk may deserve attention ahead of a lower-risk maturity gap.

Opportunity 1

Category score ☐ / 16

Improvement area

Current challenge

Recommended action

Responsible owner

Target completion date

Opportunity 2

Category score ☐ / 16

Improvement area

Current challenge

Recommended action

Responsible owner

Target completion date

Opportunity 3

Category score ☐ / 16

Improvement area

Current challenge

Recommended action

Responsible owner

Target completion date

What could proactive service delivery be worth to your MSP?

Improving Centralised Services maturity isn't simply about reducing support tickets. It's about creating a more scalable and profitable business.

Consider an MSP generating 1,200 support tickets per month, with each ticket consuming an average of 30 minutes of engineering effort.

Now consider the potential impact of eliminating 10%, 20% or 30% of that manual workload.

Tickets a month	**1,200**
Minutes per ticket	**30**
Monthly workload	**600 hours**

Improvement scenario	Monthly hours released	Annual capacity value
10% reduction	**60** hours	**$36,000**
20% reduction	**120** hours	**$72,000**
30% reduction	**180** hours	**$108,000**

Annual capacity value assumes an engineering cost of A$50 an hour (monthly hours released × 12 months × A$50). All figures are in Australian dollars.

For many MSPs, even relatively small improvements in reactive support demand can create meaningful capacity.

That capacity can be reinvested into supporting new customers, improving service quality, delivering projects or avoiding additional recruitment.

The opportunity is to move away from a model where increasing customer numbers automatically requires a proportional increase in engineering headcount.

Work it out for your MSP

Monthly workload _____ tickets a month × _____ minutes ÷ 60 = _____ hours

Hours released _____ hours × _____ % reduction = _____ hours a month

Annual capacity value _____ hours × 12 × A$ _____ an hour = A$ _____

From reactive support to proactive profitability

Building a mature Centralised Services function is not about investing in technology for the sake of technology. It's about creating a service delivery model where:

- Fewer avoidable incidents disrupt customers
- Engineers spend less time on repetitive work
- Customer environments become more standardised
- Automation and proactive maintenance improve operational capacity
- Service delivery quality becomes more consistent
- Revenue can grow without costs increasing at the same rate
- Stronger operational maturity contributes to better profitability

The best Centralised Services team isn't the one that closes the most tickets.

It's the one that prevents the most unnecessary work from reaching the service desk.

The most important shift is moving from measuring how many tickets engineers resolve to understanding how much unnecessary work your MSP can eliminate.

Three questions every MSP owner should ask

1 **How much of our engineering workload could be prevented?**

Review recurring incidents, repetitive administrative activities, monitoring alerts and customer-specific technical problems.

2 **Who is responsible for eliminating that workload?**

If nobody has clear ownership and dedicated time for proactive improvement, recurring problems are likely to continue.

3 **How will we use the capacity we create?**

Reducing manual effort creates an opportunity. Turning that opportunity into stronger margins requires a plan for how the released capacity will be used.

How Dijital Team can help

Build a more proactive, profitable MSP

At Dijital Team, we help MSPs build dedicated technical capabilities that improve margins, operational maturity and scalability. Our offshore staffing model allows you to establish proactive engineering and automation capabilities without the full cost of recruiting additional onshore technical resources.

Dedicated Centralised Services Engineers

Build a proactive operations capability focused on RMM management, patch compliance, monitoring optimisation, standardisation, recurring incident analysis and automated remediation.

Dedicated Automation Engineers

Develop and maintain automation workflows across platforms such as Rewst, Pia, n8n, Power Automate and your existing PSA and RMM systems.

L2 and L3 Engineers

Strengthen your technical delivery capability with dedicated engineers who integrate into your existing team, systems, processes and customer service standards.

The Better Business Pathway

Our Better Business Pathway helps MSPs identify opportunities to strengthen operational maturity, improve service delivery performance and unlock better margins.

Rather than simply providing additional engineers, we work with MSPs to help build more scalable and sustainable businesses.

Ready to take the next step?

You've assessed your current Centralised Services maturity. Now it's time to turn the results into action.

Book a complimentary MSP Centralised Services Readiness Review with Dijital Team.

Together, we can discuss your current results, explore your highest-priority improvement opportunities and identify how dedicated Centralised Services or Automation Engineering capability could support your business.

Book your complimentary readiness review

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