AGIO

ESSENTIAL MSP FEATURES:
AGIO'S COMPREHENSIVE EVALUATION CHECKLIST

Within the realm of investment management, Managed Service Providers (MSPs) play a pivotal role in achieving cost efficiencies, ensuring the seamless continuity of daily operations, and upholding the quality of support—standards that have become essential for most firms.

However, choosing the optimal MSP for your organization necessitates a meticulous evaluation of its appropriateness, considering the spectrum of features it offers. Plus, finding an MSP with transparent communication and self-serve options adds an extra layer to highly consider in the evaluation process.

At Agio, we recognize the challenges with switching MSPs. Change is never easy, which is why we've put together this list to make the decision process a bit smoother. Evaluate Agio against other MSPs in your decision-making process using the following framework designed to help you make an informed choice.

RAPID AND KNOWLEDGEABLE SUPPORT	AGIO	OTHER GUYS
Customer Success Manager assigned specifically for you and your specific needs.	✗	☐
24x7x365 support, and North American end user support.	✗	☐
Transparent, self-serve client portal with a host of powerful features to optimize your IT, cybersecurity, and end-user support services.	✗	☐
Custom AI-based ticket quality review system and surveys, with results shared via a centralized portal.	✗	☐
Support representatives leveraging AI and automation tools for efficient and accurate solutions for your needs.	✗	☐
AI-powered communication quality and sentiment analysis for improved interactions.	✗	☐
Clear channels for addressing concerns and providing feedback.	✗	☐
Personalized virtual agent for intelligent, on-demand issue resolution and request fulfillment.	✗	☐
Call-back based phone system to eliminate hold times.	✗	☐
Transparent escalation procedures for critical issues.	✗	☐
Expert engineering support for various cloud computing and networking systems.	✗	☐
Monthly service overview and quality reporting with analysis available via a centralized portal.	✗	☐
A customized cadence of collaborative meetings to assess performance, align objectives, and discover new avenues for ongoing enhancement and success.	✗	☐
On-site assistance to support your business operations.	✗	☐
Support for office moves, cloud migrations, etc.	✗	☐
Access to extensive knowledge base, providing your employees with a valuable resource for self-help and troubleshooting.	✗	☐

SECURE AND RESILIENT INFRASTRUCTURE AND PUBLIC CLOUD EXPERTISE

	AGIO	OTHER GUYS
Real-time IT environment overview report providing a comprehensive account and infrastructure review, highlighting risks and opportunities.	✕	☐
Procurement and setup services for client hardware.	✕	☐
Comprehensive network monitoring, intrusion detection/prevention, firewalls, web filtering, vulnerability management, and patching.	✕	☐
Industry standard network security controls and best practices across infrastructure, perimeter security, monitoring, vulnerability management, and availability.	✕	☐
24x7x365 remote helpdesk.	✕	☐
Dedicated domain provisioning.	✕	☐
Endpoint Protection	✕	☐
Two-Factor Authentication	✕	☐
Mobile Device Management	✕	☐
Desktop-as-a-Service / Cloud PC	✕	☐
Support with client environments hosted in a public cloud infrastructure.	✕	☐
Phone Service via various productivity platforms.	✕	☐
Microsoft partner with expertise that extends beyond Microsoft systems, encompassing support for various other systems and environments.	✕	☐
Microsoft 365 – E3 or E5 Licenses	✕	☐
SharePoint/OneDrive Access	✕	☐
Office 365 Backup	✕	☐
On-premise infrastructure, network device, and server management.	✕	☐

RELENTLESS CYBERSECURITY FOCUS	AGIO	OTHER GUYS
Documented configuration policies and standards aligned with SEC, NIST, and FINRA cybersecurity compliance requirements, accessible via a client portal.	✕	☐
24x7x365 Security Operations Center (SOC) dedicated to monitoring and swift incident response.	✕	☐
Proactive threat detection handled by SOC and monitoring capabilities with reporting accessible through a centralized portal, allowing real-time visibility into services and risks.	✕	☐
Incident response and remediation framework accessible through a centralized portal providing the flexibility to monitor services or risks at any time.	✕	☐
Anti-Phishing technology.	✕	☐
Comprehensive security plan and auditing.	✕	☐
Email security capabilities to detect email-borne threats.	✕	☐
Vulnerability scanning.	✕	☐
Comprehensive logs are kept for security.	✕	☐
Monthly desktop/workstation patch management.	✕	☐

INDUSTRY-SPECIFIC EXPERIENCE AND COMPLIANCE EXPERTISE	AGIO	OTHER GUYS
Financial services industry experience, including hedge fund, private equity, and registered investment advisors (RIA).	✗	☐
Technical expertise in cybersecurity, IT infrastructure, and regulatory compliance.	✗	☐
Vendor partnerships such as Microsoft Gold Partnership for faster issue resolution and escalation capabilities.	✗	☐
Certifications and accreditations demonstrating expertise and competence in specific technologies or disciplines.	✗	☐
Listed on preferred vendor lists in the industry.	✗	☐
Positive client testimonials. References, and case studies.	✗	☐
Proactive IT and cybersecurity governance and risk management portal.	✗	☐
A detailed inventory list for streamlined and efficient management of your IT assets.	✗	☐
Maintains inventory management and makes regular audits and recommendations.	✗	☐
Continuous compliance monitoring and updates (accessible via client portal).	✗	☐
Availability of policy templates (accessible via client portal).	✗	☐

ROBUST IT AND CYBERSECURITY GOVERNANCE	AGIO	OTHER GUYS
Access published 12- and 24-month governance plans conveniently through a centralized portal, accessible at any time.	✕	☐
Explore regular performance reporting and reviews effortlessly via a centralized portal, open for access at any time.	✕	☐
Find comprehensive disaster recovery plans conveniently stored in a centralized portal, accessible anytime.	✕	☐
Conduct annual disaster recovery with updates as needed, and store results in a portal accessible at any time.	✕	☐
Regular backups with offsite replication for recovery.	✕	☐
Assistance in developing and implementing client-specific continuity and recovery plans.	✕	☐
Security awareness training for employees, with additional materials accessible via the portal.	✕	☐
Support for audits and regulatory reporting, including SEC, FINRA, and NYDFS.	✕	☐
Phishing exercise offerings.	✕	☐
Due Diligence Questionnaire Support, DDQ template, DDQ Custom Questionnaire Assistance, and in-person DDQ support.	✕	☐
Basic Cyber Policy Documentation set.	✕	☐

SEAMLESS ONBOARDING AND IMPLEMENTATION PROCESS	AGIO	OTHER GUYS
Customized user onboarding and offboarding processes.	✕	☐
Comprehensive migration and remediation plan, if necessary, through a centralized platform, accessible any time.	✕	☐
Dedicated Project Manager to oversee your onboarding, along with weekly meetings.	✕	☐
User-friendly portal for efficient case management and tracking.	✕	☐
Service Catalog with custom automations for expedited handling of common requests.	✕	☐
In-depth, real-time reporting available via the portal, including service, inventory, IT governance, patch management, backup, vulnerability, and threat reporting.	✕	☐
Mobile app for iOS and Android for enhanced on-the-go support.	✕	☐
Custom knowledge articles for how-to guides, processes, policies, etc.	✕	☐

TRANSPARENCY AND FLEXIBILITY	AGIO	OTHER GUYS
Clear pricing structure communicated by team as applicable with detailed explanations of fees and charges.	✕	☐
Customizable service packages tailored to clients' needs and budgets.	✕	☐
Flexible contract terms, including options for growth and adjustments as required.	✕	☐
Well-defined SLAs for response times.	✕	☐
Client data ownership for easy migration in the event of a service provider transition, acquisition, or merger.	✕	☐

UNLOCK THE POWER OF COMPREHENSIVE AND SCALABLE IT SERVICES

Building a resilient infrastructure now ensures a strong foundation for the years to come. At Agio, we are poised to provide you with the services and resources needed to navigate complex technology landscapes, allowing you to concentrate on your firm's most impactful endeavors. Whether you're initiating your journey with an MSP or seeking a fresh start with a new MSP, we've got you covered.

Stay well-prepared by assessing the health of your existing infrastructure. **Agio's IT Infrastructure Assessment** offers unparalleled visibility into your technology environment, enabling us to identify potential risk factors and implement customized solutions to keep you operational. It's a risk-free opportunity with everything to gain.

When you're ready for comprehensive Managed IT services, we're here to assist you. Contact us today to ensure your year starts on the right tech foot.