CO-MANAGED IT / 01

SEPARATE EACH TEAM'S WORK

Choose actual proposed tasks. Mark assignments proposed or confirmed; repeat this page for more lines.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Service Line A / task in plain language / proposed or confirmed / scope reference

A: internal-team action / MSP action / third-party dependency

A: excluded work / overlap or ownership question / role asked to clarify

Service Line B / task in plain language / proposed or confirmed / scope reference

B: internal-team action / MSP action / third-party dependency

B: excluded work / overlap or ownership question / role asked to clarify

Preparation only. Not configuration, access-change, incident-response, certification, service-level or legal advice. A matrix is not work authorization. Keep credentials and private system details out.

CO-MANAGED IT / 02

CONFIRM APPROVALS AND HANDOFFS

Carry forward A and B. Record roles and private-document references, not access details or instructions.

A: approval role / prerequisites / dependency owner

A: handoff sender and recipient roles / agreed delivery or receipt record

A: responsibility confirmation reference / completion record to be provided

B: approval role / prerequisites / dependency owner

B: handoff sender and recipient roles / agreed delivery or receipt record

B: responsibility confirmation reference / completion record to be provided

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CO-MANAGED IT / 03

CLOSE THE OWNERSHIP GAPS

Tick clarified points. Leave unresolved assignments open until the affected teams confirm them.

- [ ] Every line describes an actual proposed task
- [ ] Internal-team and MSP actions are separate
- [ ] Third-party dependencies have a named role
- [ ] Proposed assignments are not presented as agreed
- [ ] Approval and prerequisite questions are recorded
- [ ] Handoff sender, recipient and receipt record are clarified
- [ ] Completion evidence is separate from responsibility assignment
- [ ] Private technical records and credentials stay outside this workbook

Service line / unresolved ownership question / reply owner / response reference

Blocked dependency or handoff / affected roles / proposed next conversation

Matrix version / changes awaiting agreement / confirmation still needed

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CO-MANAGED IT / 04

QUESTIONS FOR THE MSP

Ask both providers about the same task lines. Record the answer and supporting written reference.

Actions: what do you do, what stays with us and what depends on another provider?

Agreement: which assignments are assumptions, and where is responsibility confirmed?

Approvals: who approves, what must be ready and who resolves blocked dependencies?

Handoffs: who receives the work, and how are delivery and receipt distinguished?

Evidence: what completion record and open-item report are included for each task?

Changes: how are ownership gaps and scope changes agreed by affected teams?

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CO-MANAGED IT / 05

COMPARE THE SAME SERVICE LINES

Use MSP A and B against one shared matrix version. Clarify different assumptions before choosing.

MSP A / B / proposal dates / service-line matrix version supplied

Internal-team, MSP and third-party actions or exclusions - A / B

Prerequisites, approval roles, handoff and completion records - A / B

Open ownership gaps, change process, timing and written terms - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai if you choose, then start a Managed IT request. Describe the shared service tasks without private system details so participating pros can compete with proposals. Compare responsibilities, handoffs, exclusions, timing and written terms. A private discovery conversation may be needed before confirming scope.

Start a request

One request. Every pro's best offer.

Participation varies. A private task and shared-responsibility review may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/managed-it/co-managed-it

NCSC: choosing an MSP (official reference)

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