

## MSP efficiency checklist

### A checklist for MSPs



While every MSP is different, they often face the same key challenge: bandwidth. Whether you're a one-man shop or managing a growing team of technicians, you're constantly trying to create more time — to support clients, to introduce new services and to keep innovating. But here's the hard truth: The problem isn't the number of hours in the day. It's the efficiency of your systems.

Your team can only move as fast as your systems allow. When tools are disconnected, processes are manual or documentation is inconsistent, the impact goes far beyond lost time. It leads to missed revenue, increased risk and a frustrating experience for both technicians and clients.

In fact, nearly 50% of MSPs in the State of the MSP Report say AI and automation will be their clients' top IT and service need in 2026.

The MSPs that scale successfully build connected, efficient systems that eliminate friction and enable smarter operations.

Use this checklist to identify where your MSP can reclaim time, improve service delivery and increase profitability.

## Are your core tools fully integrated?

Most MSPs gradually build their tech stack — adding a PSA, then an RMM and later implementing a documentation platform and additional security tools as client needs evolve. The challenge is that these tools often fail to communicate effectively with one another, leading to disconnected systems that result in duplicate data entry, manual workarounds and constant context switching for technicians.

Nearly **30% of MSPs report that their tools aren't integrated enough**, and many admit they aren't using their solutions to full capacity. If your team spends more time navigating tools than solving problems, it's a clear sign your systems are working against you instead of for you. Now is the time to evaluate your current setup and explore solutions that bring your tools and workflows together.

## Are you still stuck in reactive, break-fix mode?

If your daily operations revolve around fixing issues as they arise, you're operating in a reactive cycle that limits growth. Many MSPs have normalized break-fix work to the point where they are not just resolving issues, but actively scheduling them. This leaves them with little time for strategic or proactive initiatives.

While **53% of MSPs use automation for monitoring and alerts**, most apply it to only a fraction of their workload. In fact, 55% automate just a quarter of their processes and 28% automate about half, leaving significant room for improvement. Without expanding automation beyond basic use cases, MSPs remain reactive rather than preventive.

## How much manual work is still slowing you down?

Manual processes continue to drain time and resources across MSP operations, particularly in areas that could easily be automated. While **53% of MSPs use AI** for tasks such as ticketing, patching and monitoring, nearly half still rely on outdated, manual workflows that reduce efficiency and increase the likelihood of errors.

By leveraging integrated tools with built-in AI capabilities, MSPs can eliminate repetitive tasks, streamline workflows and free up technicians to focus on more complex, high-value work that drives business growth.

## Can you clearly prove your value to clients?

IT support often operates behind the scenes, which makes it easy for clients to underestimate its impact. This challenge is growing as MSPs now face increased pressure to demonstrate their value amid tighter budgets.

The number of **MSPs struggling to prove their value to clients has nearly doubled** from 10% in 2025 to 19% this year. Difficulty with documentation also rose from 10% to 17%. These trends highlight a growing expectation for clear, measurable and easily accessible reporting that shows how your services reduce risk, improve uptime and enhance operational efficiency.

## Are inefficiencies eating into your margins?

Operational inefficiencies don't stop at service delivery; they extend into your revenue processes as well. When systems like PSA, billing and documentation are disconnected, MSPs often miss billable time, struggle to align contracts with assets and spend unnecessary time reconciling invoices manually.

Improving efficiency in these areas has a direct impact on profitability. With integrated systems, billing can be automatically tied to tickets, assets and agreements, ensuring accuracy while reducing administrative overhead. At the same time, AI-driven automation is creating new growth opportunities by enhancing service delivery and supporting higher-value pricing.

The 2026 Kaseya State of the MSP Report shows **52% of MSPs invest in efficiency and automation** to counter slow revenue growth and economic pressure.

### Turn efficiency into a competitive advantage

Efficiency isn't achieved by adding more tools to your tech stack or by working harder. It is achieved by creating smarter systems that enable your team to focus on higher-value work, strengthen client relationships, improve security posture and drive long-term growth.

Ready to deliver faster, more consistent service to clients? Watch our on-demand webinar to learn how AI-driven automation helps MSPs turn noise into action, enabling smarter, more scalable service delivery.

[Watch webinar](#)

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