

Managed Service Provider Due Diligence Template

General Information

Provider Name

Contact Person

Email

Phone Number

Address

Date Completed

Company Overview

Year Established

Legal Structure

Description of Services Provided

Number of Employees

Financial Stability

Annual Revenue

Profitability (last 3 years)

Financial Statement Availability

Security & Compliance

Certifications (e.g. ISO 27001, SOC 2)

Data Protection Policies

Incident Response Plan

Regulatory Compliance

Service & Support

Service Level Agreements (SLAs)

Support Availability

Escalation Procedures

References & Reputation

Client References

Review of Legal Actions/Pending Litigation

Relevant Case Studies or Testimonials

Risk Assessment

Identified Risks

Mitigation Strategies

Notes & Comments