

Self-assessment scorecard

How Profitable Is Your MSP?

Six questions. Four minutes. Circle the answer closest to your last 12 months.

Each answer is worth 0 to 3 points, shown beside each option. Add up your points and use the key at the end to see where your MSP stands.

1. What is your blended gross margin?

☐ Under 35%	0 pts	☐ 35 to 44%	1 pt
☐ 45 to 54%	2 pts	☐ 55% or higher	3 pts

Gross margin score: _____

2. What is your EBITDA margin?

☐ Under 5% or not sure	0 pts	☐ 5 to 9%	1 pt
☐ 10 to 14%	2 pts	☐ 15% or higher	3 pts

EBITDA score: _____

3. What share of revenue is recurring (contracted, monthly)?

☐ Under 30%	0 pts	☐ 30 to 49%	1 pt
☐ 50 to 69%	2 pts	☐ 70% or higher	3 pts

Recurring revenue score: _____

4. What is your average technician utilization?

Billable or contract-covered hours as a share of available hours.

☐ We don't track it	0 pts	☐ Under 55%	1 pt
☐ 55 to 69%	2 pts	☐ 70% or higher	3 pts

Technician utilization score: _____

5. What is your annual customer retention rate?

☐ Under 80% or not sure	0 pts	☐ 80 to 89%	1 pt
☐ 90 to 94%	2 pts	☐ 95% or higher	3 pts

Customer retention score: _____

6. How dependent is the business on you day to day?

☐ It stops if I step away	0 pts	☐ Most decisions still go through me	1 pt
☐ Leaders run most areas	2 pts	☐ Documented processes run it	3 pts

Owner dependency score: _____

Your total score: _____ / 18

Score	Stage	What it means
0 to 6	Foundation stage	Your MSP has real upside. Pricing, recurring revenue, and financial tracking are where the fastest profit gains usually come from.
7 to 12	Growth stage	You have a solid base, with clear opportunities to lift margins and reduce your day-to-day load. Focused improvements can move EBITDA meaningfully.
13 to 18	Performance stage	You're running a strong business. The next gains come from fine-tuning, leadership depth, and building enterprise value.

Where to focus first

Look at your lowest-scoring areas. These are usually your biggest profit opportunities.

Low score in	Where to start
Gross margin	Review pricing, standardize your stack, and fix unprofitable agreements.
EBITDA	Benchmark operating expenses and track profitability monthly, not yearly.
Recurring revenue	Move project and break-fix clients onto managed service agreements.
Technician utilization	Start measuring it, then tighten dispatch and automate repeat work.
Customer retention	Add regular business reviews and watch for at-risk accounts early.
Owner dependency	Document processes and build a leadership team that can decide without you.

Ranges are general guidance for self-assessment, not formal industry benchmarks. A TAG financial review compares your numbers against peer data.

Review your results with TAG National

Find out how your numbers compare and where your next gains will come from.

Book a no-obligation discovery meeting with TAG National.