

MSP Client Documentation SOP

Document no.	SOP-MSP-001
Revision	1.0
Owner	Documentation Lead
Effective date	October 15, 2026
Review cycle	Every 6 months

1. Purpose

To give every managed client one complete, current and trusted documentation set, so technicians resolve tickets faster, onboard new staff quickly and never depend on knowledge that lives in one engineer's head.

2. Scope

Applies to all documentation the MSP keeps about each managed client: company profile, contacts and approvers, sites, network, servers, cloud tenants, applications, vendors and client-specific runbooks. Credentials are referenced from the password vault, never stored in documents.

Definitions

Client hub	The single documentation section for one client that every other client document lives under or links to.
Core documentation set	The minimum documents every client must have: overview, contacts, sites, network, servers and cloud, applications, vendors and runbooks.
Authorized approver	A named client contact allowed to approve changes, purchases, access requests and credential handovers.
Runbook	A step-by-step procedure for a task that recurs at one client, such as setting up a new user or resetting their VPN.
Stale document	A document that has not been reviewed within its review interval and can no longer be trusted without checking.

3. Responsibilities

Documentation Lead	Owns the documentation standard and templates, creates each client hub, and audits completeness and freshness every month.
Technical Account Manager	Documents the client overview, contract scope and contacts, and reviews the client's documentation before every business review.
Systems Engineer	Documents sites, network, servers, cloud tenants and line-of-business applications, and writes client-specific runbooks.
Service Desk Technician	Uses the documentation on every ticket and corrects or adds documentation before closing a ticket that exposed a gap.
Client Point of Contact	Confirms contacts, approvers and business rules, and tells the MSP about changes such as new sites, staff or vendors.

RACI matrix

Activity	Documentation Lead	Technical Account Manager	Systems Engineer	Service Desk Technician	Client Point of Contact
Set up the client hub	R/A	C	C	I	-
Document the client overview and contacts	C	R/A	I	I	C
Document infrastructure and applications	A	I	R	C	C
Update documentation after tickets	A	I	R	R	-
Review and audit documentation	R/A	R	C	I	C

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Documentation platform with one section per client
- Client documentation template set
- PSA ticketing system
- RMM tool and its device inventory
- Password manager with a vault per client
- Documentation review tracker

5. Procedure

Step	Task	Owner	Done
5.1	Create the client hub The Documentation Lead creates the client hub from the standard template set before the first ticket is worked, with the same section structure every client uses.	Documentation Lead	☐
5.2	Record the client overview The Technical Account Manager documents the company profile, business hours, contract scope, SLA, after-hours rules, key contacts and authorized approvers. Checkpoint: The approver list names who may approve changes, purchases, access requests and credential handovers.	Technical Account Manager	☐
5.3	Document sites and locations The Systems Engineer documents each site: address, access instructions and alarm codes reference, on-site contact, internet circuits and where the network equipment is located.	Systems Engineer	☐
5.4	Document the network The Systems Engineer documents or links the network diagram, IP addressing, VLANs, firewall, VPN and wireless details, following the network documentation SOP.	Systems Engineer	☐
5.5	Document servers, cloud and applications The Systems Engineer documents servers, cloud tenants and line-of-business applications, including admin portals, license details, dependencies and vendor support contacts.	Systems Engineer	☐

Step	Task	Owner	Done
5.6	Reference credentials from the vault The Systems Engineer stores every credential in the client's vault and links the vault entry from the related document instead of copying the password. Warning: Never paste a password into a document, ticket or chat message. Link to the vault entry so access stays logged and revocable.	Systems Engineer	☐
5.7	Write client-specific runbooks The Systems Engineer writes step-by-step runbooks for tasks that recur at this client, such as new user setup, printer issues or line-of-business application restarts.	Systems Engineer	☐
5.8	Set an owner and review date The Documentation Lead makes sure every document shows its owner and next review date, so stale content is visible to anyone who opens it.	Documentation Lead	☐
5.9	Update documentation when closing tickets The Service Desk Technician corrects or adds documentation before closing any ticket that exposed missing or wrong information, and links the document in the ticket. Checkpoint: Every closed ticket notes either the documentation it updated or that no change was needed.	Service Desk Technician	☐
5.10	Confirm contacts with the client The Client Point of Contact confirms the contact list, approvers and after-hours rules each quarter and reports any staff, site or vendor changes as they happen.	Client Point of Contact	☐
5.11	Review documentation before business reviews The Technical Account Manager reviews the client hub before each quarterly business review and raises gaps, outdated items and risks found in the documentation.	Technical Account Manager	☐
5.12	Audit completeness every month The Documentation Lead runs a monthly report of missing core documents and stale pages across all clients and assigns each gap to an owner with a due date.	Documentation Lead	☐

6. Quality checks

- Every managed client has a client hub with the full core documentation set.
- No credentials are stored in documents, tickets or chat; documents link to vault entries.
- Every document shows an owner and a review date that has not passed.
- Contacts and authorized approvers were confirmed with the client within the last quarter.
- Tickets that exposed documentation gaps were closed with the documentation updated.

7. Records

- Client hub and core documentation set
- Authorized approver list confirmed by the client
- Monthly documentation audit report
- Ticket notes linking updated documentation

8. KPIs

- Percentage of clients with a complete core documentation set
- Percentage of documents past their review date

- Share of tickets resolved using existing documentation
- Time for a new technician to work a client's tickets unassisted

9. Common mistakes

- Keeping passwords in documents or tickets instead of the vault.
- Letting one senior engineer hold client knowledge that was never written down.
- Documenting a client once during onboarding and never reviewing it again.
- Using a different structure for every client, so technicians cannot find anything.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	October 15, 2026	Initial release	Ilia Pirozhenko

Approval

Prepared by	Approved by	Date

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