

# MSP Patch Management SOP

|                |                  |
|----------------|------------------|
| Document no.   | SOP-MSP-006      |
| Revision       | 1.0              |
| Owner          | Service Manager  |
| Effective date | October 15, 2026 |
| Review cycle   | Every 6 months   |

## 1. Purpose

To patch every managed client's operating systems and third-party applications on a predictable schedule, inside agreed maintenance windows, with enough testing that a bad patch never reaches every client at once.

## 2. Scope

Applies to operating system, firmware and third-party application patches on servers and endpoints the MSP manages through its RMM tool. Network device firmware follows the same cadence but is scheduled as a change.

### Definitions

|                    |                                                                                                                                 |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------|
| Patch policy       | The RMM settings that decide which patches are approved, when they install and how devices reboot for a client or device group. |
| Pilot ring         | A small group of devices at each client that receives patches first, before the rest of the client's devices.                   |
| Maintenance window | The agreed time when the MSP may install patches and reboot a client's systems.                                                 |
| Out-of-band patch  | A security patch released or deployed outside the normal monthly cycle because the risk cannot wait.                            |
| Patch exception    | A device or patch deliberately excluded from patching, with a documented reason and the client's acceptance of the risk.        |

## 3. Responsibilities

|                           |                                                                                                                  |
|---------------------------|------------------------------------------------------------------------------------------------------------------|
| Patch Administrator       | Maintains patch policies in the RMM, reviews vendor releases, runs the rings and produces compliance reports.    |
| Service Manager           | Approves the broad rollout each cycle, authorizes out-of-band patching and owns patch compliance across clients. |
| Service Desk Technician   | Works tickets for devices that failed or missed patching and for user issues caused by a patch.                  |
| Technical Account Manager | Agrees maintenance windows and exceptions with each client and reports patch status at business reviews.         |
| Client Point of Contact   | Approves maintenance windows, names systems that need special handling and accepts the risk of exceptions.       |

### RACI matrix

| Activity                                 | Patch Administrator | Service Manager | Service Desk Technician | Technical Account Manager | Client Point of Contact |
|------------------------------------------|---------------------|-----------------|-------------------------|---------------------------|-------------------------|
| Agree maintenance windows and exceptions | C                   | I               | -                       | R/A                       | C                       |
| Maintain RMM patch policies              | R                   | A               | -                       | I                         | -                       |
| Approve the broad rollout                | C                   | R/A             | I                       | I                         | -                       |
| Remediate failed devices                 | C                   | A               | R                       | -                         | -                       |
| Report patch status to the client        | C                   | I               | -                       | R/A                       | I                       |

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

## 4. Materials and PPE

### Materials, tools and systems

- RMM tool with patch management
- Third-party application patching catalog
- Vendor release notes and security advisories
- Client maintenance window register
- Patch exception register
- PSA ticketing system
- Patch compliance report per client

## 5. Procedure

| Step | Task                                                                                                                                                                                                                                                                                    | Owner                     | Done                     |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|--------------------------|
| 5.1  | <b>Agree patch windows with each client</b><br>The Technical Account Manager agrees each client's maintenance windows, reboot rules and systems that need special handling, and records them in the client documentation.                                                               | Technical Account Manager | <input type="checkbox"/> |
| 5.2  | <b>Configure client patch policies in the RMM</b><br>The Patch Administrator sets up each client's patch policies in the RMM to match the agreed windows, including third-party applications and a pilot group of devices.                                                              | Patch Administrator       | <input type="checkbox"/> |
| 5.3  | <b>Review vendor releases each month</b><br>The Patch Administrator reviews the monthly vendor releases and known issues, and decides which patches to approve, defer or block.                                                                                                         | Patch Administrator       | <input type="checkbox"/> |
| 5.4  | <b>Patch the MSP's own systems first</b><br>The Patch Administrator deploys the approved patches to the MSP's internal devices first and watches for problems for at least one business day.                                                                                            | Patch Administrator       | <input type="checkbox"/> |
| 5.5  | <b>Deploy to client pilot rings</b><br>The Patch Administrator releases the patches to the pilot group at every client in their next maintenance window and reviews the results and any tickets raised.                                                                                 | Patch Administrator       | <input type="checkbox"/> |
| 5.6  | <b>Approve the broad rollout</b><br>The Service Manager reviews pilot results across clients and approves the broad rollout, or holds specific patches that caused problems.<br><b>Checkpoint:</b> No patch moves past the pilot rings without the Service Manager's recorded approval. | Service Manager           | <input type="checkbox"/> |

| Step | Task                                                                                                                                                                                                                                                                                                                                                         | Owner                     | Done                     |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|--------------------------|
| 5.7  | <b>Deploy inside maintenance windows</b><br>The Patch Administrator lets the RMM deploy the approved patches to all remaining devices inside each client's maintenance window, following the agreed reboot rules.                                                                                                                                            | Patch Administrator       | <input type="checkbox"/> |
| 5.8  | <b>Handle out-of-band critical patches</b><br>For an actively exploited vulnerability, the Service Manager authorizes out-of-band patching, and the Technical Account Manager tells affected clients before deployment.<br><b>Warning:</b> Even urgent patches go to a pilot group first, unless the Service Manager decides the risk of waiting is greater. | Service Manager           | <input type="checkbox"/> |
| 5.9  | <b>Review patch compliance per client</b><br>After each cycle the Patch Administrator reviews the compliance report for every client and opens tickets for devices that failed, were offline or are pending a reboot.                                                                                                                                        | Patch Administrator       | <input type="checkbox"/> |
| 5.10 | <b>Fix devices that failed patching</b><br>The Service Desk Technician works each failed-device ticket: brings offline devices online, clears install errors, schedules reboots with users and confirms the patch installed.                                                                                                                                 | Service Desk Technician   | <input type="checkbox"/> |
| 5.11 | <b>Document patch exceptions</b><br>The Technical Account Manager records every device or patch that cannot be applied, with the reason, compensating controls and the client's written acceptance of the risk.                                                                                                                                              | Technical Account Manager | <input type="checkbox"/> |
| 5.12 | <b>Report patch status to the client</b><br>The Technical Account Manager reports compliance, exceptions and unsupported systems to the client each month and at every business review.                                                                                                                                                                      | Technical Account Manager | <input type="checkbox"/> |

## 6. Quality checks

- Every client has documented maintenance windows matched by its RMM patch policy.
- Patches reached client pilot rings before any broad rollout.
- Every device that failed or missed patching has a ticket.
- Every patch exception has a reason and the client's written risk acceptance.
- Each client received a patch compliance report this month.

## 7. Records

- Client maintenance window register
- Monthly patch approval decisions
- Patch compliance report per client
- Patch exception register with client acceptance

## 8. KPIs

- Patch compliance rate per client
- Days to deploy critical security patches
- Number of patch-related incidents per cycle
- Number of open patch exceptions

## 9. Common mistakes

- Approving every patch for every client at once with no pilot ring.
- Patching outside the client's agreed maintenance window.
- Ignoring third-party applications and only patching the operating system.
- Leaving unpatchable systems undocumented instead of recording an exception.

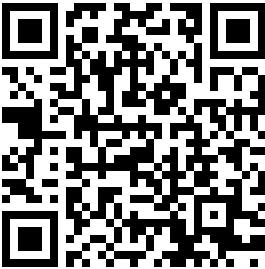
10. Revision history

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

Approval

| Prepared by | Approved by | Date |
|-------------|-------------|------|
|             |             |      |

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