

Trust Maturity Matrix

| | Level 1: Initial (ad hoc) | Level 2: Defined (standardized) | Level 3: Managed (measured) | Level 4: Optimizing (continuous improvement) |
|--|--|---|---|---|
| Alignment | | | | |
| Service expectations (for customers & employees) | <ul style="list-style-type: none"> - Service requirements and agreements (MSA, SLA, SOWs) vary significantly from customer to customer; project to project - Service quality and time spent greatly depends on the individual performing the work - Documented workflows and SOPs are extremely limited or non-existent | <ul style="list-style-type: none"> - Service requirements & agreements are standardized, with little variation - Service quality and time spent generally uniform across technicians - Documented SOPs available for most workflows; documentation process clearly established | <ul style="list-style-type: none"> - Service requirements & agreements are regularly reviewed for compliance and profitability - Service quality and time spent actively tracked and regularly reviewed - Documentation creation and maintenance tracked | <ul style="list-style-type: none"> - Service requirements and agreements actively iterated on - Agreement compliance and profitability used to identify what work/clients to pursue & to avoid - Dedicated resource devoted to developing and improving service delivery systems |
| Strategic alignment (for customers & employees) | <ul style="list-style-type: none"> - Quarterly business reviews (QBRs) aren't happening or are limited to a technical overview of service delivery actions and performance - Only person able to conduct QBRs is the owner - MSP employee career development paths are not clearly documented or discussed | <ul style="list-style-type: none"> - QBRs are built around strategic business discussions and include developing and maintaining a roadmap - QBR process is documented and can be executed by others in addition to the owner - Career paths are defined with clear objectives and time tables | <ul style="list-style-type: none"> - Dedicated vCIO resource exists who owns and conducts QBRs separately from sales and service delivery conversations, with independent goals and metrics - Reviewing and tracking career path progress is an established part of employee onboarding and performance reviews | <ul style="list-style-type: none"> - vCIO services are providing insights and opportunities for improving service delivery, additional services and project work, etc. - vCIO services are being actively measured and iterated on - Career development is regularly refined and turned into a competitive advantage |
| Values alignment (for customers & employees) | <ul style="list-style-type: none"> - Company mission, vision, and values are undefined and/or not clearly conveyed | <ul style="list-style-type: none"> - Mission, vision, and values are documented and clearly communicated | <ul style="list-style-type: none"> - Key initiatives are measured against mission, vision, and values - Values are publicly referenced and there are examples of the company following through on them | <ul style="list-style-type: none"> - Key initiatives are iterated on to better adhere and support company values |
| Communication | | | | |
| Feedback loop (for customers & employees) | <ul style="list-style-type: none"> - Little or no proactive outreach for feedback - Feedback not systematically collected, reviewed, or utilized - No official process for employee reviews | <ul style="list-style-type: none"> - Gathering, reviewing, and responding to feedback baked into SOPs - Documented processes in place for employee reviews | <ul style="list-style-type: none"> - Systems in place for collecting, responding to, and tracking customer and employee feedback at scale - CSAT, NPS, and/or other metrics tracked | <ul style="list-style-type: none"> - Feedback continuously utilized to improve services, processes, and operations in a systematic way |
| Signals | | | | |
| Social proof (for customers & employees) | <ul style="list-style-type: none"> - No proactive, systematic process in place for collecting and utilizing testimonials, awards (ex: MSP 501, Best Places to Work) satisfaction ratings, etc. | <ul style="list-style-type: none"> - Documented processes in place for collecting and utilizing testimonials, case studies, awards, satisfaction ratings, etc. | <ul style="list-style-type: none"> - Goals in place for obtaining and utilizing testimonials, case studies, awards, etc. - Ways of measuring impact in place | <ul style="list-style-type: none"> - Dedicated resource in charge of owning and improving processes and results |