

MSP PM Maturity Scorecard

Assess your project delivery operation in 10 minutes

How to use this scorecard

Rate your MSP on each of the 8 dimensions below using the 1–5 scale. Check the box that best describes your current state — be honest, not aspirational. Total your score at the end, then use the maturity legend to see where you stand and what to fix first.

SECTION 1 OF 2

Project delivery fundamentals

DIMENSION	SCORE 1	SCORE 2	SCORE 3	SCORE 4	SCORE 5
Scope Management	1 No SOW exists or verbal only ☐	2 Basic SOW, missing exclusions ☐	3 SOW with exclusions, rarely enforced ☐	4 Signed SOW + change request process ☐	5 Full scope control, all changes documented ☐
	1 Engineers own their own projects ☐	2 One person does PM part-time ☐	3 Dedicated PM coordinator exists ☐	4 Fractional or full PM owns portfolio ☐	5 PMO with clear RACI on all projects ☐
	1 No formal schedule or milestones ☐	2 Dates exist but not tracked ☐	3 Tracked in PSA, rarely updated ☐	4 Weekly schedule reviews, risks flagged ☐	5 Critical path managed, dates enforced ☐
	1 Reactive only — clients call first ☐	2 Updates sent when asked ☐	3 Weekly emails, inconsistent format ☐	4 Standardized status reports weekly ☐	5 Proactive updates, escalation playbook ☐

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Continued — Section 2 & scoring

SECTION 2 OF 2

Operational structure and tooling

DIMENSION	SCORE 1	SCORE 2	SCORE 3	SCORE 4	SCORE 5
Risk Management	1 No risk process — react to issues ☐	2 Risks noted informally ☐	3 Risk log exists, rarely reviewed ☐	4 Weekly risk review, owners assigned ☐	5 Proactive risk mgmt, escalation SLAs ☐
PSA Utilization	1 PSA used for tickets only ☐	2 Projects in PSA, no standard template ☐	3 Standard template, partial use ☐	4 PSA drives all PM activity ☐	5 PSA fully configured, AI-augmented ☐
Portfolio Visibility	1 No view of all active projects ☐	2 Spreadsheet or manual tracking ☐	3 PSA dashboard, updated inconsistently ☐	4 Weekly portfolio review meetings ☐	5 Live dashboard, automated status rollup ☐
Process Documentation	1 No documented PM process ☐	2 Some templates, rarely used ☐	3 Templates exist, used inconsistently ☐	4 Documented playbook, team trained ☐	5 Full PMO framework, continuously improved ☐

YOUR SCORE

Tally your results

Add up your 8 scores. Total: / 40

Min: 8 | Max: 40 | Typical MSP: 14–19

Be honest — an accurate score identifies the right starting point.

MATURITY LEGEND

What your score means

8–13	Level 1: Ad Hoc Projects are owner-dependent and inconsistent. Delivery relies entirely on individual effort. Immediate PM intervention has the highest ROI. Start with a PM Audit.
14–19	Level 2: Developing Some structure exists but is not consistently enforced. You have tools but no operating rhythm. A Fractional PM Retainer will formalize and stabilize delivery quickly.
20–27	Level 3: Standardized Solid foundation. Templates and processes exist and are generally followed. Focus on enforcement consistency and portfolio-level visibility.
28–34	Level 4: Managed Strong PM operation. Projects close predictably. Next step: AI-augmented reporting and workflow automation to multiply output without adding headcount.
35–40	Level 5: Optimized Top 5% of MSPs. Continuous improvement culture, proactive risk management, AI-integrated ops. Consider white-labeling or coaching others.

Your Next Step

Based on your score — here's what to do

Levels 1–2 (Score 8–19)

- Book a PM Audit — \$2,500 fixed fee, 2-week turnaround. You need an outside eye on what's actually happening before you can fix it.
- Stop letting engineers run projects. Assign one person as interim PM owner immediately, even imperfectly.
- Implement a simple SOW template for every new project. One page is enough to start.
- Establish a weekly 30-minute project review with whoever touches project delivery.

Level 3 (Score 20–27)

- Consider a Fractional PM Retainer. You have the foundation — you need someone to operate it consistently.
- Invest in PSA configuration. Most Level 3 MSPs have ConnectWise or Autotask for tickets, not for project PM.
- Build a formal change request process. Scope creep is still your biggest margin leak at this level.
- Start tracking portfolio health weekly, not just per-project.

Levels 4–5 (Score 28–40)

- Explore AI-augmented operations via Gridmind — automated reporting, AI risk flagging, and workflow automation deliver the next efficiency leap.
- Evaluate your PMO documentation for scalability. Can a new PM pick up your playbook and run with it?
- Consider white-labeling your PM approach as a client-facing service — a differentiator few MSPs offer.
- Your next constraint is probably not PM — it's sales capacity and service line expansion.

Ready to talk through your score?

Book a free 30-minute PM Assessment call. We'll review your scorecard, identify your highest-leverage fix, and give you a recommendation — no pitch.

criticalpathpmo.com/call