The Real-World MSP Training Checklist We Swear By

If you're reading this, there's a good chance your employee training program isn't doing what you hoped.

You've assigned the certifications, shared the video library logins, and told your team that training matters. But it's not getting done. The few who finish the certs often can't apply what they've learned to real-world tickets. And the A-players, the ones who actually follow through, are usually the first to leave for a raise, taking those skills with them.

So what's going wrong?

Most MSP training fails because it depends on motivation in an environment that constantly drains it.

Traditional MSP training asks people to run a marathon in the middle of a sprint. (You closed 11 printer tickets before lunch, your brain is fried, now go learn something new.) MSPs operate in high-pressure, interrupt-heavy environments. Traditional learning doesn't fit that pace.

So how do the best of the best make training successful at MSPs? The team at Empath has talked to many of them and compiled a checklist of common factors contributing to their success.

What follows is a 10-step framework we've seen work. It's practical, repeatable, and grounded in day-to-day realities. If you want a training program your team will actually use, this is how you build it.

Let's get started.

Step 1:

Get Executive Buy-In

(By Showing the Real Cost of Doing Nothing)

This is the most important step. If leadership isn't all-in, the training program won't stick. It'll get deprioritized, underused, and eventually forgotten. So before you roll anything out, you've got to convince yourself and your leadership team that training isn't a nice-to-have.

The problem? You're already paying for the lack of training. It's buried in your service board, hiding in escalations, wasted time, and repeated tasks.

The first move is to surface that cost and make it real.

Start with a quick "Cost of Inaction" audit. All you need is 30 minutes and a calculator.

- Pick one recurring issue on your service desk. Something low-level but constant. Think "VPN won't connect," "Printer offline," or "Password reset."
- Now ask your Service Manager: "How much total time did we spend on this last month?" Be sure to count everything, frontline time, escalations, and leadership involvement.
- Multiply that total by your average loaded labor cost.
- That number is your stupid tax. That's what you're paying every month because there's no clear, repeatable way to handle a simple issue.

Of course, this formula is a generalization to fit any MSP. Your specific data is always better than generalized data. But even as a rough estimate, the number is usually shocking enough to prove the point.

When the real cost becomes visible, the decision to invest in training becomes practical. Clarity is what creates durable buy-in.

And that buy-in is the foundation for everything else.

Step 2:

Appoint a Learning Manager

Every program needs an owner. If no one's responsible, it won't take hold, no matter how good your intentions are.

You don't need an L&D department (or even a full time employee) to fix this. You just need one person to carry the flag.

We call that person the Learning Manager.

This role exists to own the system around learning, not to create content or "make people train." Their job is to design the conditions where learning can happen naturally during the workday.

The ideal learning manager is a team lead who genuinely cares about sharing knowledge, has the respect of their peers, and wants to see those around them grow.

Your next move is simple: appoint your Learning Manager this week.

The Learning Manager keeps the weekly training time on the calendar, checks in with anyone falling behind, and becomes the internal go-to for the program.

One of the most important things they do is normalize the struggle that comes with learning. When someone feels stuck or unsure, knowing there's a trusted person to turn to makes training feel safer and far less intimidating.

It's a small shift, but it's one that helps training become a steady part of the work.

If this role feels familiar—or accidental—that's not a coincidence. It's common for MSPs to discover a Learning Manager after the work has already landed on someone's plate.

Empath's Head of Learning Design & Innovation, **Keith Craig**, hosts a livestream series called ***The Accidental Learning Manager***, focused entirely on what this role actually entails and how to make it sustainable inside real MSP operations.

Important tip:

The MSP owner can't be the Learning Manager.

The MSP owner has other responsibilities and will quickly turn into the bottleneck. The second their attention shifts to a major project or client issue, training will fall off the radar and die.

✅ Step 3:

Define What Good Looks Like (Build Your Skills Matrix)

Once you've got buy-in and a Learning Manager in place, it's time to answer the most important question: *"What problem are we trying to solve with training?"*

If your answer is *"to get certs"* or *"to be better,"* you're already off track.

The plan goes sideways when MSPs treat certifications or time on the job as stand-ins for readiness. But that's how you end up with a tech who has Net+ and a CCNA and still can't troubleshoot a basic VLAN issue. Or someone who's been around for two years, gets bumped to Tier 2, and is suddenly in over their head.

That's a measurement issue.

As Empath's Head of MSP Success **Dean Trempelas** likes to say, *"You don't need a tech who can recite a subnetting chart. You need one who can spot an IP addressing issue and solve it, or at least know where to look."*

One is knowledge. The other is behavior. And behavior is what you need to train for.

Here's your next move: build a simple Skills Matrix.

- Start with your most critical role, usually Tier 1. Open a spreadsheet.
  - Two columns:
    - Common Problem
    - Target Behavior

That's it.

This matrix becomes your curriculum. It defines what *"good"* looks like on your actual help desk. It's the specific behaviors your team needs to succeed in the real world.

This is where Keith's core philosophy shines, *"Knowledge alone doesn't create skill, practice and behavior do."*

When people can see the behaviors that matter most, they know what to practice, what to improve, and what success actually looks like in their day-to-day work.

✅ Step 4:

Consolidate Your Content

(Follow the One Login Rule)

You've got buy-in. You've got a Learning Manager You've mapped out what *"good"* looks like. Now it's time to figure out where the actual training lives.

This is also another place where most MSPs blow it.

They scatter their resources. One login for Microsoft Learn. Another for ConnectWise University. A third for internal SOPs buried in SharePoint. Add vendor portals, playlists, and tribal knowledge, and you're asking your team to juggle a dozen logins just to learn how to do their job.

To your employees, that says, *"your time isn't valuable."*

If it's hard to find, it won't get used. If they have to reset a password or dig through bookmarks, they'll skip it. The friction is too high.

Dean comments on this common scenario, *"If returning a shopping cart is too much effort, most people won't do it, even if they know it's the right thing to do."*

You need a single source of truth.

Because you're building this manually, you'll need to improvise a central hub. It doesn't have to be pretty, but it does have to be simple and consistent.

- Start with a quick Content Audit.
  - Open a spreadsheet and list every vendor university, SOP, training doc, and video you expect your team to use. You'll probably find more than you realize.

- Then pick your Container, one place where every training link will live:
  - **Option A: Your Documentation Tool** – Create a "Training" folder in IT Glue or Hudu.
  - **Option B: Your PSA** – Build an internal project with phases or tickets for each module (e.g., "Watch Sophos Firewall Video" with the link right in the task).
  - **Option C: A Simple Spreadsheet** – When all else fails, put everything into a single Excel file with direct links.

The format doesn't matter as much as the rule: if they have to look in two places, you've already lost them.

Keith would call this reducing "activation energy," the effort someone has to spend just to begin. When the starting point is obvious and easy, people naturally engage more often and with less hesitation.

Step 5:

Customize Your Training to Your MSP

Generic training creates generic techs.

If you just assign a standard CompTIA A+ course or a vendor cert, you're not teaching your team how to succeed at your company. You're training them to be a sysadmin in a vacuum and that's not your reality.

As Dean puts it, a typical certification might spend half the time on manual subnetting, a skill your team might never actually use. What they really need is to recognize a VLAN issue in your stack and troubleshoot it using your tools, your processes, and your SLAs.

You have to MSP-ify your training.
That means wrapping every lesson in your own context.

Here's how: for every major training module, add a Context Layer. Three parts:

- **Tie it to your core values**
  - Don't just teach how to document a ticket. Explain that clean documentation shows Respect for the next tech who picks it up. That turns a task into a cultural habit.
- **Tie it to your toolset**
  - The vendor video might explain a generic firewall setting. Record a quick Loom to show exactly where it lives in your portal. Same skill, totally different impact.
- **Tie it to outcomes**
  - The textbook says "fix the printer." Your training should say, "If it's not fixed in 15 minutes, deploy a loaner or escalate, because uptime matters more than closing a ticket."

This doesn't require a full production studio. In fact, simple is better. The goal is relevant training.

Keith often points out that *"good enough"* context beats perfect content.

Context reduces uncertainty, helps techs recognize patterns sooner, and gives them the confidence that what they're learning will actually matter in their day-to-day work.

Step 6:

Build Your Learning Pathways (Create the Map)

This is where your content turns into a strategy.

Back in Step 4, you centralized your training materials. But a pile of SOPs and vendor videos isn't training. A new tech logs in, sees 500 videos, and freezes. They don't know where to start, so they don't.
You need to give them a map.

We call this a Learning Pathway. Think of it like leveling up in a video game. You don't fight the boss on Day 1. First, you learn the controls, take on small challenges, and build from there. Your training should do the same.

Start simple. Create a text doc for your first Learning Pathway, let's say, Tier 1 Onboarding. Don't just dump a list of links. Lay it out as a clear, linear journey:

- **Phase 1: The Basics (Week 1)**
  - Read the Employee Handbook
  - Watch "How We Triage" video
  - Complete "Tools Setup" checklist
- **Phase 2: Core Skills (Week 2)**
  - Watch "Password Reset" SOP video
  - Shadow a senior tech for 2 hours
  - Close 5 low-complexity tickets
- **Phase 3: Assessment (Week 3)**
  - Complete a mock ticket from start to finish with no help

The goal is clarity. With a defined path, your team always knows exactly what to do next.

Step 7:

Identify Key Use Cases
(Go Beyond Onboarding)

Training doesn't stop after onboarding. If your employees only log in during their first 90 days, what you've built is just orientation.

To create a true learning culture, you need to identify the moments where training naturally fits into your business lifecycle.

Start by picking three recurring events that should trigger training and build a simple process around each.

- When you roll out a new tool (like a security platform), require a short training module before anyone gets access. That keeps mistakes low and buy-in high.
- For compliance, assign an annual refresher: HIPAA, security awareness, or whatever your contracts require, so you're not scrambling at audit time.
- And for promotions, define the pathway. Want to go from T1 to T2? Here's the exact training to complete before the interview.

Keith often talks about reducing ambiguity. When the trigger is clear, the expectation is clear. And when the expectation is clear, follow-through increases.

Step 8:

Integrate Accountability

(Make It Part of the Workweek)

Even the best training plan will fail if there's friction. Dean uses the shopping trolley analogy: people know they should return the cart, but if it's raining or the corral is too far, they won't.Training works the same way. If it feels like extra work, it gets ignored.

Keith emphasizes that accountability is about structure.

Training feels supported when people know what's expected and know someone will follow up.

- Start by building training time into the schedule. Create a recurring service ticket for each tech: one hour a week. It signals that training is billable work.
- During weekly 1:1s, managers should ask, *"What did you learn that you can use today?"* Not just "*Did you finish?"*
- And for critical tools, enforce the rule: no access until training is done.

A consistent check-in helps normalize the ups and downs of learning, removes the fear of falling behind, and gives people a place to ask for clarity when they need it.

This kind of accountability guides people. And guidance is what keeps training alive week after week.

✅ Step 9:

Create a Launch Plan

Remember: you're wired for long-term thinking. Your team is wired to clear their queue. If you don't sell the vision, training will feel like just another task.

Hold a dedicated all-hands meeting to launch the program.

- Start by **acknowledging reality**: *"We know you're getting thrown into the fire without enough support. That's frustrating."*
- Then **explain the problem clearly**: *"Training hasn't always translated into real-world skill. We're changing how we approach it."*
- Then **present the solution**: *"We're defining what good looks like. We're giving learning a place in the workweek. And we're assigning ownership."*
- And most importantly, **show them the future**: "*Want to move to T2? This is the exact roadmap.*"

Be explicit about what the program is, what it is not, and how it will support them.

People commit more fully when they understand why something exists and how it benefits them.

A strong launch creates shared understanding, and shared understanding is what keeps a team aligned long after the kickoff meeting is over.

✅ Step 10:

Reward and Iterate

(Because a Raise in Two Years Isn't Enough)

Training is a long game. But your team needs short-term wins.

Dean calls it *"tactical dopamine"* or giving people that small hit of satisfaction for doing the right thing.

If the only reward for training is a possible raise down the road, they'll check out. You need to make progress visible.

- Set up a simple gamification plan.
- Post a leaderboard with training hours or modules completed. Techs are competitive, lean into it.
- Give shout-outs during weekly huddles: *"Great job, Sarah, for using the new firewall SOP to close that ticket in 10 minutes."*
- And every quarter, ask your team what's working and what's not. If a course is useless, kill it.

Iteration is part of the process. When you update what isn't working and celebrate what is, you signal that learning is a living system.

How You Operationalize Training at Scale

Everything above? You can run it today. The checklist is real. It works. And if you follow it, you'll build a training program that actually sticks.

But it's a lot of manual effort, especially as your team grows.

Tracking links. Managing checklists. Chasing people for updates. It takes constant oversight to keep the momentum going.

That's where Empath comes in.

Empath doesn't replace your Learning Manager. It supports them.

We built the platform to provide the structure and visibility that makes this checklist sustainable:

- **Centralize Your Content**
  - No more bouncing between five portals. Empath becomes your team's single hub, combining expert-led MSP training with your vendor content and internal SOPs all in one place.
- **Contextualize for Your MSP**
  - With our Recorder, you can quickly layer your own voice and tools over generic content. Show your techs how you do it, not just how it's done.
- **Start Fast with Pre-Built Paths**
  - We've already mapped Learning Pathways for common roles. Use them out of the box or customize them to match your org chart and career ladder.
- **Automate Accountability**
  - Stop wondering who watched what. Empath makes learning visible, with dashboards for managers and tools that help Learning Managers maintain rhythm without micromanaging.

The checklist creates the structure. Empath helps you maintain it.

When you're ready to move from good intentions to a system that lasts, Empath is built to support that shift.

Book a demo and see how it works.