UNSHACKLED 2.0

FREEDOM FROM SERVICE DELIVERY ISSUES

EBOOK

Brought to you by Advanced Global MSP Coaching

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MSP COACHING

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Opening Comments

Time and time again, we've heard how MSPs want to be free to grow their business. Too often, Service Delivery operational issues shackle the business and hold it back from truly flourishing.

Service Delivery issues such as:

- Scalability
- Blocking sales personnel from focusing on Sales
- Operational inefficiencies
- Lack of KPIs
- Failure to leverage the information

Or as one MSP put it "Service Delivery issues are the barrier to our growth"

The bottom line: in order for the MSP's business to grow, Service Delivery requires operational maturity and foundational improvements.

This is not any one MSP's issue…it's seen throughout the industry. As Paul Dipple from Service Leadership, Inc. said, "There is no MSP Service
Delivery training available." Andy Kennedy from Congnition360 said, "No PSA comes pre-configured for profitability".

We also know that Autotask provides excellent navigation training, but it's too much to expect a

event.
software developer to understand MSP Service Delivery operations.

An even bigger problem is that the World depends on IT, and customers aren't going to wait around for an MSP to fix their Service Delivery operational issues – especially not in today's competitive, demanding world.

We look forward to providing you with a copy of the Service Delivery Optimization Roadmap, which will empower you to lead your company through the tourney to being Unshackled and meeting customers' needs as expected.

Meanwhile…relax. The path of freeing your business from Service Delivery operational issues - so that the Business can finally grow - is right around the corner.

I am Steve, enjoy the read …
Steve

Service Delivery Team: Everyone on the project and support teams, along with their managers and support personnel.

"Stephen's analytical approach to Autotask's data has improved the core engineering break/fix experience and successful responses."

- ADRIAN WELLS
Senior Engineer,
Systems Engineering Inc..

Overview:

Beginning with the end in-mind, how do we know when an MSP is truly free to grow the business?

It's simple: When ServiceDelivery is optimized.

And how do we know when it's optimized?

- Resource Utilization is above 80%.

(Industry average without optimization is below 70%)

- SLA Performance is above 95%.

(Industry average without optimization is around 63%)

- Mean Time to Resolve (MTTR) is less than 2 Business

Days
(Industry average without optimization is above 9 business days)

- Reactive Hours per Endpoint per Month is below .15 or below an average of 15 minutes per Endpoint

(Industry average without optimization is closer to an hour per Endpoint)

What does freedom to grow the business look like? When you are free to:

- Scale the business, knowing Service Delivery can handle the increased workload
- Increase revenue by adding both new customers and new services - without adding more personnel
- ·Boost profits, both in $$ and in %
- Release the burden of micromanaging the company, including the service delivery team
- Pursue the original purpose and vision for starting the company in the first place
- Be more actively engaged within the community around you

A word to the wise About profit:

More sales and/or more revenue are not the key to profitability.

Does that seem surprising? It's actually not. But why?
First, if the company is not profitable, more sales just makes you busier, not more profitable. As a matter of fact, without being profitable, more sales just means you are losing money faster and increasing the risk of going out of business sooner.

Second, if the company is profitable, more sales may increase your bottom line, but the efficiency - and therefore the margins of profitability - remains the same.

But what about economies of scale?

Great question. On paper, if the 24-hour monitoring team can take on more Managed Service customers without adding additional resources or tools, then adding more Managed Service customers would lead to more profitability.

However, based on our experience, the assumption that there's room to take on more customers is based on anecdotal, peer comparison, not an internal audit.

In reality, Parkinson's Law is at play here – work expands to fill the time available for its completion.

So, adding more Managed Service customers, quarterly business reviews (QBRsp, Projects, etc. comes with a cry for more help from the Service Delivery team. It required engagement from company executive management to change habits for the Service Delivery team to have the bandwidth to take on more work.

How does moving from average in the industry to Service Delivery optimization equate to increased profit?

- Resource utilization is above 80%:

o$31,200 times the # of techs per year

- SLA Performance is above 95%:

o$160 times the # of Managed Service customers per year

- MTTR is less than 2 business days:

o$150 times the # of requests taking more than 2 days to complete

- Reactive Hours per Endpoint (RHEM) is about 0.25 hours:

o$1,560,000 per 1,000 endpoints per year

Project:
ITIL's definition: This is a subset of customer requests that ITIL defines as non-incident. What sets these service requests (non- incident) apart is the labor liability and the amount of risk in completing the work on time and on budget.

PMI defines a project as a specific amount of work with a specific start and end date, and then proceeds to define 9 competencies in their Project Management Book of Knowledge (PMBoK) that it takes to manage projects. Most of these ideologies are true and work well - except for MSPs - because MSPs do a lot more than manage projects.

AGMPSC's definition of a project:
Any request estimated to be over 16 hours of labor!
Note: in this eBook, anytime we use the word Project, we are talking about a process, not a tool to capture time such as Task vs Ticket.

Remember:
It takes management engaging and working to change habits for the Service Delivery Team to have the bandwidth to take on more work.

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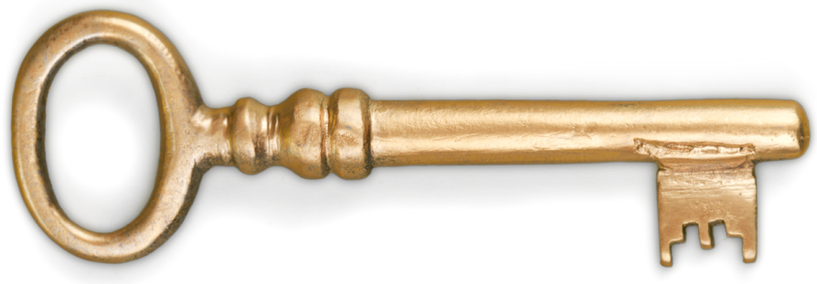
Service Delivery Optimization is the Key

A Service Delivery Optimization (SDO) program, such as the one laid out in this eBook, is foundational to having the freedom to grow the MSP business. SDO is the process of the Service Management and the Service Delivery Teams collaborating to bring about the operational changes necessary to grow the business.

Once the foundation is in-place, the Service Delivery Team will have the tools they need, and Service Delivery andProject management are then able to lead the company to the SDO freedom necessary to grow the MSP's business.



Service Coordinator:
The person responsible for intake of customer requests, and who is also responsible for all open tickets, shepherding them through from New to Complete.

Project Manager:
Coordinates projects upon closure of sales opportunities. The coordination is between Sales, the Project Team, the customer, and the rest of the company.

Project Team:
All personnel directly engaged with or supporting the project. Usually this includes everyone involved except the salesperson, MSP owners or its executive team, and the customer.

Support Team:
The group of people responsible to intake, engage, and complete all non-project requests.

Remember:
What takes time are the Mindset Changes, Education, and Service Delivery Team buy-in ...

The six phases of foundation / configuration improvements are:

1. Identification of operational areas of improvement
   - Take the Service Delivery Operational Self-Evaluation to identify the areas of Improvements
   - Contact AGMSPC for a FREE no-obligation Autotask PSA Configuration Evaluation

2. Customer request segmentation and prioritization
   - Paying special attention to distinguish project work and installations from standard support activities.

3. SLA Automation
   - Configuring the PSA to provide the framework to support ensuring the techs know what to work on next.

4. Establishment of customer-facing communication protocol
   - Keeps the customer apprised of the incident or request engagement process.
   - Builds a consistent Service Delivery rhythm.

5.Buildout of advanced dashboards
   - Provides techs and Service Coordinators with the tools to organize their day.
   - Providing Service and Project Managers with real time performance reporting.
   - Freeing Owners up to focus on growing the Company.

6. Labor Invoicing Automation
   - Moves the burden of ticket coding for billing purposes from the Support Team to the Professional Services Automation (PSA) software.
   - Improves the quality and fairness of the invoicing process.

How long does it take to implement the Six Phases?

For me it was an 11-year process, one that's still evolving and improving, even today. It's been 30 years when you add Carol, Lea Ann, Cathy and Duncan's experience to the mix.

However, we're very proud to say that today, we can take a customer drowning in chaos and mature them to a Level 5 MSP in less than a year.

> **"Why does it take so long? Configuration changes should be done in a few hours, so the whole process should only take a few weeks!"**
>
> **- Adam S, Computer Courage**

We hear this question and statement a lot.

For a new Autotask customer, we can build their Autotask database from default to optimized configurations in less than a month. It's the mindset changes, the team member education and the Service Delivery team buy-in that can be so time-consuming:

Old Mindset:

1) Not everyone in the company knows what Sales is selling, including Sales.

2) Not all requests are created equal, which is why we use Ticket Types.

3) Requests need to be worked on by priority: Critical, High, Medium, and then Low!

4) We get very little useful information out of the PSA software, and what we do get doesn't facilitate changing of Service Delivery team habits.

5) Keep the founder/owner from picking up the tools and jumping in to "help" the Support Team or from getting bogged down with helping them make tactical decisions.

6) Unsure how to manage projects. ("Yesterday, I was a full-time Service Manager, and now I also need to manage projects.")

7) We need to follow ITIL and PMI best practices.

New Mindset:

1) Requests divided into separate workflows to allow optimization of each (note: we have identified 11 workflows every MSP faces daily).

2) Service requests come in various sizes and each size needs a well-defined criteria and matching workflow to best support it.

3) Lists of tickets should be ordered based on contractual agreements (response SLAs), driving what techs should work on next.

4) Customers need to be part of the process and updated at strategic intervals on the "New" to "Complete" journey.

5) Dashboards organize our days, telling us what to work on next and providing awareness of everything we are responsible for.

6) A single point of coordination, in the form of a Service Coordinator for every shop with at least 3 techs, is needed and is more than worth the investment.

7) Techs don't not need to know what's in the MSAs, but they do need to answer one question: "What type of work did you do?"

8) Until this foundation is built, it's impossible to manage efficiently.

9) Proactive maintenance has benefits that out- weigh the cost and effort of implementation.

10) Knowledge sharing is the key to efficiency.

Owner:
The person who has the final decision authority. This can be a partner, president, CEO, or many other arrangements. They usually are a Tech that struck out on their own and are now struggling to move from picking up the tools to focusing on growingthe business.

Service Manager:
The person responsible for Service Delivery performance, both at the Company level, and the Individual Support Team member level.

Remember:
Build a SOLID foundation!

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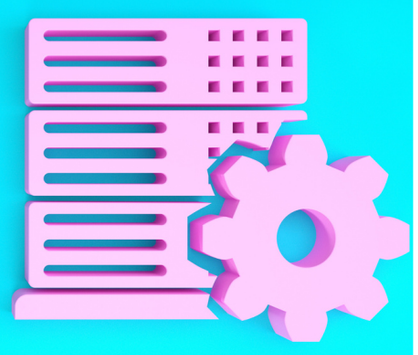
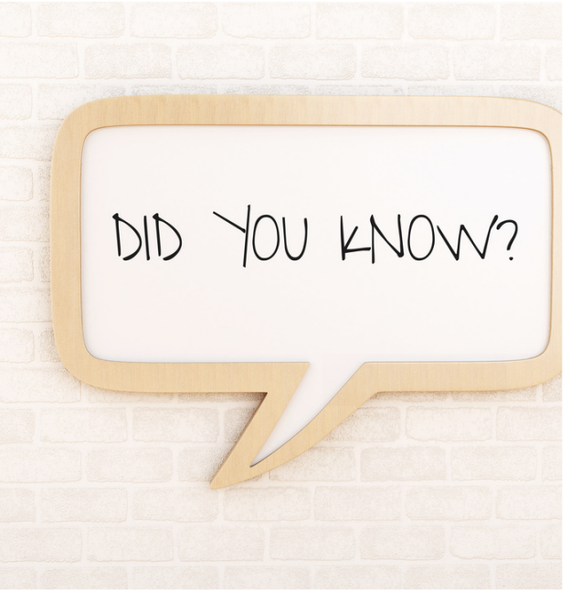
6 Foundational / Configuration Improvements



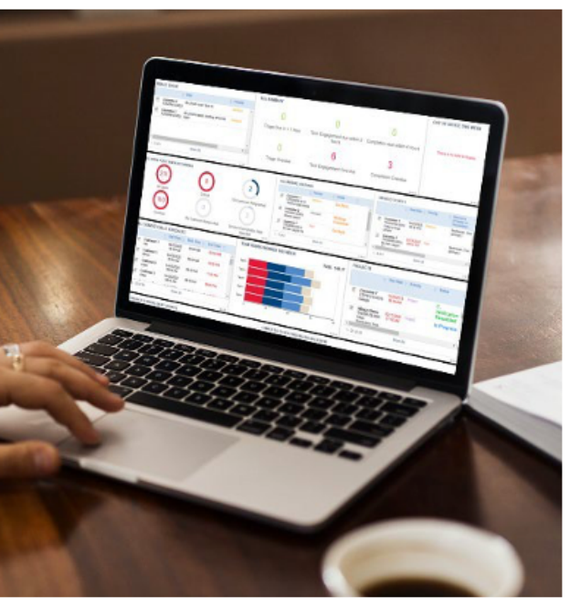
Key #1: Base PSA Configurations

Key #2: Request Segmentation - separating project & installs from support activities



Key #3: SLA automation: making sure the techs know what to work on next

Key #4: Customer-Facing Communication Protocol: Communicating with the customer both richly, consistently, & strategically



Key#5: Advanced Dashboards: Provide techs and Service Coordinators with the tools to organize their day

Key #6: Labor Invoicing Automation: A single time-entry field driving the billing process

Key #1: Base PSA Configurations:

Aaron Kennedy of Cognition360 said, in The Tech Tribe workshop: The MSP Agreement Margin Maximizer, that “No PSA comes pre-configured for profitability”. This means it’s up to the New or mature MSP to figure out how to configure the PSA tool for SDO. Paul Dipple in and IT Glue Webinar said, “There’s no MSP training available”.

We’re here to change that. And at no cost to you, we offer two products to guide you through the base PSA configurations of a mature MSP.

The first product is a Service DeliveryOperational Self-Evaluation that will take you thru a series of exploratory questions about the Service Delivery operation to pin-point where you need to make procedural improvements.

The second product is a FREE No-Obligation PSA Configuration Evaluation where we compare your the Autotask PSA configurations against AGMSPC’s Autotask best practice configuration standard build. Developed over the last four years, our standard build is based on our years of Autotask System Administrator experience working for and with MSPs from around the world, merging their best practices and adjusting our thoughts, philosophy and approach.

The results of our FREE No-Obligation PSA Config Eval are provided to you in three groups:

1) Simple changes the MSP can do on its own.

2) Changes a little more complicated, in which we recommend a conversation either in one of the Autotask/Datto RMM Ask the Expert calls or a Free 30-minute Coaching Call.

3) Configuration improvement project work as presented in the next 5 keys in this eBook.

Key#2: Request Segmentation -separating project & installs from support activities

We’ve said this before, and we’ll say it again because it’s just that important:

Not all Customer requests are created equal!

So, why do we try and engage on and complete all of them with the same process?
Separating different types of customer requests into different workflows and writing a different Standard Operating Procedure (SOP) for each workflow just makes sense - not only from a New-to-Complete process perspective but also in that it provides a way to journey-map, benchmark, track, analyze and improve.

Different tools are needed to determine if incident responses are meeting contractual obligations, than if projects are being completed on-time and on-budget, recurring scheduled engagements are revealing sales opportunities, changes are being properly approved, or if other service request work is meeting the customer’s unwritten yet reasonable expectations.

In other words, maximizing profitability starts by dividing the work into separate workflows so each workflow can be independently improved and optimized.

It ends with ensuring the MSP’s liabilities are mitigated, and that employees’ happiness and raving fan creations are happening. The net effect is maximized efficiency, as well as creating an environment where increased revenue results in more profit.

“Automation is cutting costs by tightening the corners and not cutting them.”

- HARESH SIPPY

c..

Remember:
We offer two products to guide you through the base PSA configurations of a mature MSP.

Below are the most common ways to segment customer requests in the Autotask PSA software:

·Priority
·Ticket Type
·Ticket Category
·Issue and Sub-Issue

While there may be more, these are the four that are available in the SLA automation. From our experience, Priority is the best field to use in the ticket to segment requests because:

1) It's a list that can be customized, whereas ticket type cannot be changed.

2) It's highly-visible,well-known, and easy to update
– ticket category is more burdensome to use and servesa different purpose.

3) Issue and sub-issue have more value for other purposes, which would be limited if otherwise used for segmentation request.

We'll elaborate on why Priority is the best field to segment requests when we talk about how to configure the PSA software's SLA automation: so the techs know what to work on next.
or now, trust us that Priority is the best. As we move on in the request segmentation discussion, here's what using Priority to segment requests looks like:

As we've mentioned before, ITIL defines customer request segments into incidents and service requests. We further divide service requests into:

- Quick Hit A/Cs <1 hr - take less than an hour of estimated remote engagement time to complete.

- M/A/C < 4 hrs or Minor Service Request – (M/A/Cs = Moves/Adds/Changes) takes less than 4 hours of estimated time to complete.

- M/A/C > 4 hrs or Major Service Request - take over four hours of estimated time to complete and may need scheduling to avoid disruption and delay in completion.

- Installation –take over eight hours of estimated time to complete, needs to be scheduled to avoid disruption and delay in completion, and may need some planning time before engagement. (***no established SLA***)

- Project - takes over 16 hours of estimated time to complete, needs to be scheduled to avoid disruption and delay in completion, and needs a totally different Sales to Project Management workflow including:

"The most dangerous kind of waste is the waste we do not recognize."

-SHIGEO SHINGOc..

Remember:
Priority is the best field to segment requests.

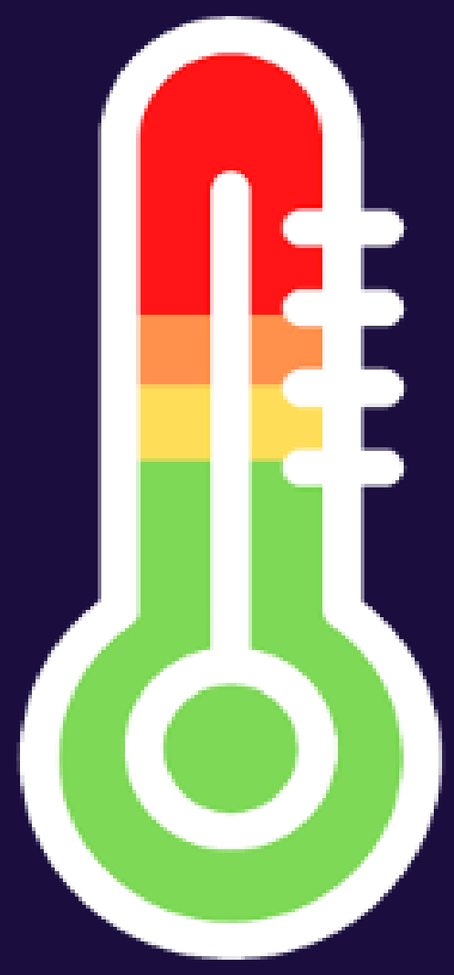
- Sales engineering review
- Scope of work
- Build of materials
- Three levels of meetings
- Estimated labor hours and work scheduling pattern

(***no established SLA***)

Recurring Schedules – also known as proactive maintenance visits, network administration visits, technology advisory audits, etc.

As MSPs, incidents are something we do very well break/fix is our specialty, but incidents can also be subdivided, allowing for more detailed benchmarking, tracking, and improvements. Most PSA software platforms come with four Priority levels (Critical, High, Medium, and Low), but there are two adjustments we recommend:

- Critical - Network, server, or core application is down. Critical also has a different written SOP than other incidents.
- High - Latency, or other network degradation, key personnel/device affected.
- High - Back Up – Any daily or Weekly Backups, excluding hourly increments, where the expectation is the backup job needs to run upcoming evening.
- Medium - Single user impacted but has a work-around for the incident/issue.



All PSA software comes with four Priority levels:

- Critical
- High
- Medium
- Low

As a final note before we move on about PSA configurations:

We aren't replacing or changing the default priority levels (Critical, High, or Medium) – we're renaming Low to Standard. Also, we recommend adding Service Request Priorities (Quick Hit A/Cs <1 hr, M/A/Cs <4 hrs, M/A/Cs >4 hrs, Installation, Project, and Recurring Schedules) as well as creation of a special incident, High – Back Up.

- Standard – Anything less urgent than Medium, replacing the Low priority because we'd never tell a customer they, or their request, isn't important.

**Note: ITIL defines incidents as anything that's not working as designed. Therefore, password resets are not incidents as the password mechanism is working as designed. By default, anything that's not an incident is considered a service request. Therefore, password resets are a type of service request.

We prioritize password resets as "Quick Hits" because, while they aren't incidents, due to our revenue stream coming from external customers expecting easy things to be fixed quickly, we need to treat them like incidents. The priority Quick Hits was created to appease the "ITIL Police", while also appeasing account managers screaming at us in our cubes that this needs to be done right away.

	Priority Name*	Active
1	Critical	✓
2	High	✓
3	High - Back Up	✓
4	Medium	✓
5	Standard	✓
6	Quick Hit A/Cs <1 hr	✓
7	M/A/Cs <4 hrs	✓
8	M/A/Cs > 4hrs	✓
9	Installation	✓
10	Project	✓
11	Recurring Schedules	✓

Resource planning for MSPs video:
www.agmspcoaching.com/resource-planning-video

Key #3: SLA automation: making sure the techs know what to work on next

Have you ever wondered where the Automation is in Professional ServicesAutomation software? Well, for the most part, it's hidden. There are four levels of Automation in the Autotask PSA software:

1) Workflow rules (WFR)
a.To be covered in this and the next chapter

2) Response SLA Automation
a.Discussed in this chapter

3) Labor Invoicing Automation
a.Has a chapter all its own

4)Scheduled live reports
a.Part of the Service Manager toolbox and mentioned at the end of eBook

Workflow rules:
Most people are aware of WFRs, but in truth, they represent the least powerful level of automation. Workflow rules are reactive, requiring an event to trigger the automation.
It's great at moving tickets around and saving support personnel from some manual processing by freeing them up from updating the rest of the fields in the ticket. They're also really helpful when it comes to customer communication - but they do very little to help organize a tech's or Service Coordinator's day.

Response SLA automation:
A word about the term SLA. Just like so much of our jargon, SLA has two meanings:

1) There's Contract SLA, which is determined by the type of work excluded from various levels of services offered in the Managed Service Agreements (MSA). This SLA drives billing arrangements and will be discussed in more detail within the Labor Invoicing Automation chapter, later in this eBook.

2) And there's Response SLA, which includes 3 significant time stamps on the New-to-Complete customer request life cycle: Triage (First response), Tech Engagement (Resolution Plan), and Completion (Resolved)**.

** Note: These 3 SLA Clocks are hardcoded in the PSA software. But renaming them, we can repurpose certain aspects of the SLA concept to better serve the MSP industry, better than ITIL envisioned back in the 60's when SLAs were born.

Live Reports:

Live Reports is one of three reporting tools that comes standard with the Autotask PSA software (in addition to standard reports and data warehouse SQL reports).

Live Reports are best used:

- To report historical data
- When an audit trail is needed
- When a widget doesn't have access to the data

Response SLA automation is much more powerful than WFRs because response SLA Automation is a proactive automation. Response SLA Automation can see events coming and can tell the techs what to work on next, as well as alerting Service Coordinators where to put their energies.

It's the response SLA automation that can be used to inform the Techs of what to work on next. We say "can be used" because, like the other Autotask automations, it doesn't come preconfigured with the PSA software.

By default, the configurations are blank. The reason for this is that configurations depend solely on the MSA contractual obligations. We could guess what astandard SLA looks like, but in reality, it's dependent up on what's been negotiated with the customers.

For clarification purposes, when we're talking about contractual obligations, we're only talking about one time stamp (Tech Engagement/Resolution Plan), one type of customer request (Incidents), and one type of Customer(Managed Service customer).

However, that doesn't mean the response SLA automation can't be used to organize all customer requests.

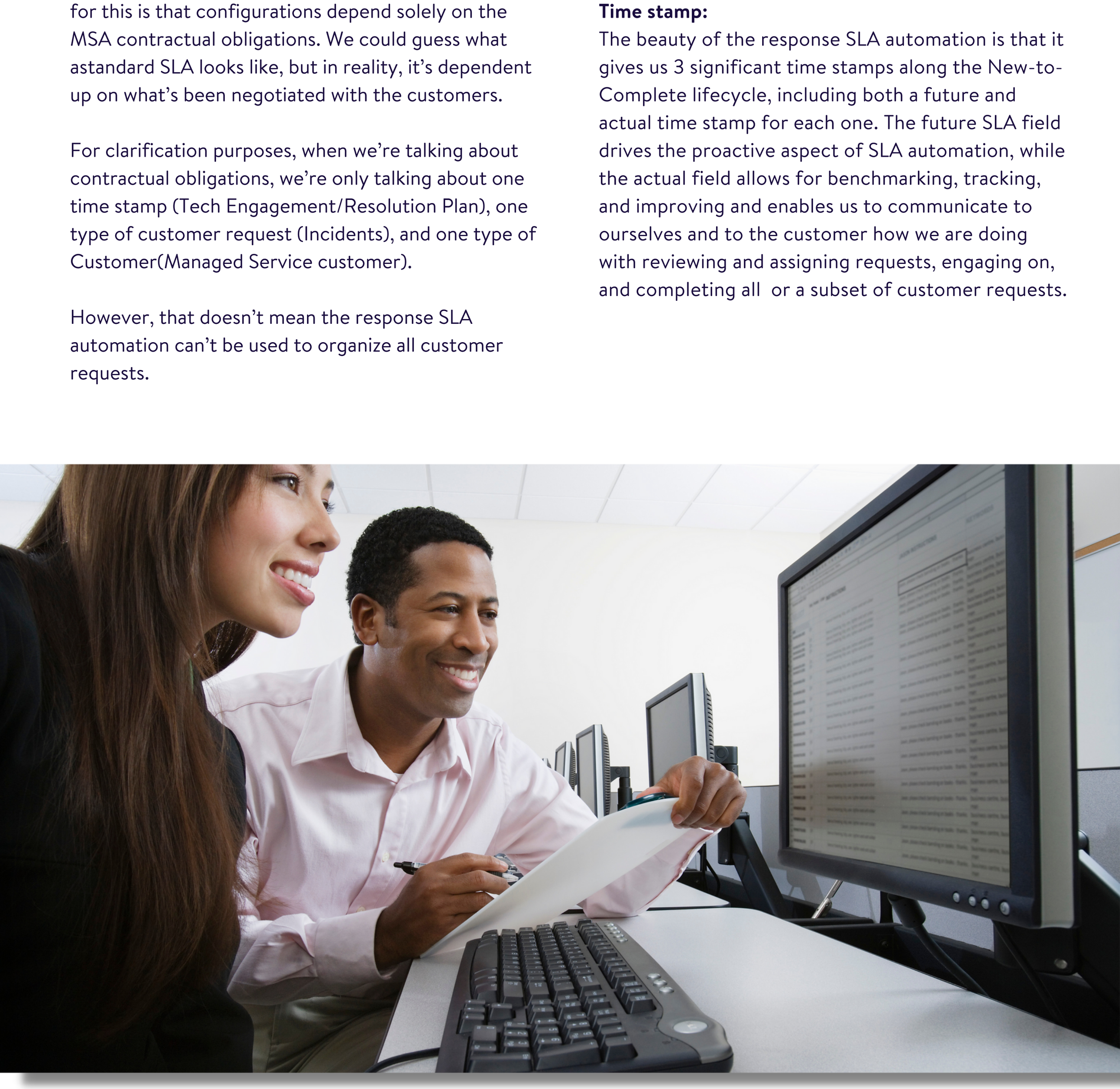
It just means the software was designed with one purpose in-mind, but it's flexible enough to be used in all circumstances, except for three:

1) Projects - because each project has a negotiated start and end date.

2) Installations – unique based on the product and its scope of work

3) Recurring Schedules - because they're scheduled up to a year in advance, and the SLA clocks are based on creation date.

Time stamp:
The beauty of the response SLA automation is that it gives us 3 significant time stamps along the New-to-Complete lifecycle, including both a future and actual time stamp for each one. The future SLA field drives the proactive aspect of SLA automation, while the actual field allows for benchmarking, tracking, and improving and enables us to communicate to ourselves and to the customer how we are doing with reviewing and assigning requests, engaging on, and completing all or a subset of customer requests.



"The secret to getting started is breaking down your complex tasks into small manageable tasks, and then starting on the first one."

-MARK TWAIN

Therefore, response SLA automation provides the following fields of information (found at the top of the Ticket History under the Tools dropdown menu)

1) SLA Event: Triage (First Response)
a. Due Date
b. Actual

2) SLA Event: Tech Engagement (Resolution Plan)
a.Due Date
b.Actual

3) SLA Event: Completed (Resolved)
a. Due Date
b. Actual

Ticket type:
Very few MSPs are using the ticket type field and for good reason:

1) It's located outside of the normal ticket processing flow and is a small, hard-to-see field.

2) The list of ticket types is hardcoded in the software and can't be customized to meet our needs.

3) The list follows ITIL thought processes and not the reality of MSP ServiceDelivery workflows.

Response SLA automation was designed for incident ticket type only, along with Autotask providing the four default priorities of Critical, High, Medium, and Low.

While response SLA automation does recognize the ticket type, it doesn't provide the granularity we need. It segments requests by Incident, Service Request, Problem, Change and Alert. While this would be okay (at best), we can't change the list, and the list as-is doesn't meet our need for Request Segmentation or SLA automation.

Remember:
While Response SLA Automation does recognize the Ticket Type, it does not provide the granularity we need.

Other options to segment customer requests that could be used to configure response SLA automation include the following:

Ticket Category:
Ticket category could provide the granularity; however, it also is a field that is less used and not in the normal ticket processing workflow. Therefore, it would be cumbersome to use it for the purpose of configuring a response SLA automation.

Issue and Sub-Issue:
Using Issue and Sub-Issue to drive response SLA automation would detract from the benefit of providing a way to slice the data when ServiceManagers look for areas of improvements.

Since Ticket Type, Category, or Issue and Sub-Issue don't meet the criteria needed for response SLA automation, we turn to Priorities to segment customer requests and leverage the design of response SLA automation. This automates the process of techs knowing what to work on next, and Service Coordinators knowing which tickets need attention for all customer requests (except Project and Recurring Schedules).

Type of customer:
In order for the techs to truly know what to work on next, they also need to know when to work on Managed Service customer requests vs. non-Managed Service customer requests.

The beauty of the response SLA automation is that we can create and configure a non-contract response SLA without needing to create a contract. And we can set the response times at 2x to 4x the standard contract SLA.

We can then apply the SLA to all tickets without a contract. For this, we do need the WFR automation to apply a non-contract SLA to all non- project or non-recurring scheduled event tickets where the Contract Category field is empty.

A note regarding the difference between 2x and 4x standard contract SLA: At a 2x non-contract rate, the T&M Customer is usually OK with the "Best Effort" as they realize they are not paying for expedited service. But if the MSP would like to aggressively upsell T&M Customers into a MRR Service Agreement, then a 4x non-contract rate is much more effective.

Remember:
What is great service to the customer?
Great communication!

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Key #4: Customer-Facing Communication Protocol: Communicating with the customer both richly, consistently, and strategically

80% OF CUSTOMERS LEAVE THEIR MSP DUE TO POOR SERVICE TO THE CUSTOMER, NOT THE TECHNICAL EXCELLENCE.

CITE: HDI'S CUSTOMER SERVICE REPRESENTATIVE TRAINING

This should be a major wake up call to a MSP Owner, just like howe more sales isn't the solution to profitability.

But what is great service to the customer? Communications – go figure.

On a strategic level, knowing who to communicate with, what to communicate and when to communicate it.And how to communicate is critical.

- Who: usually the ticket contact, the primary contactfor the account,or both.

- What: the facts and nothing but the facts, with a giant banner telling them why they're receiving the notifications, and company branding to clearly tell them who's sending them the notification.

- When: at each major milestone (status) in the journey from New-to-Complete, including:

1. New
2. Remote/Onsite
3. Reviewed and Assigned, or Scheduled
4. Engaging
5. Disengaging
6. Completion

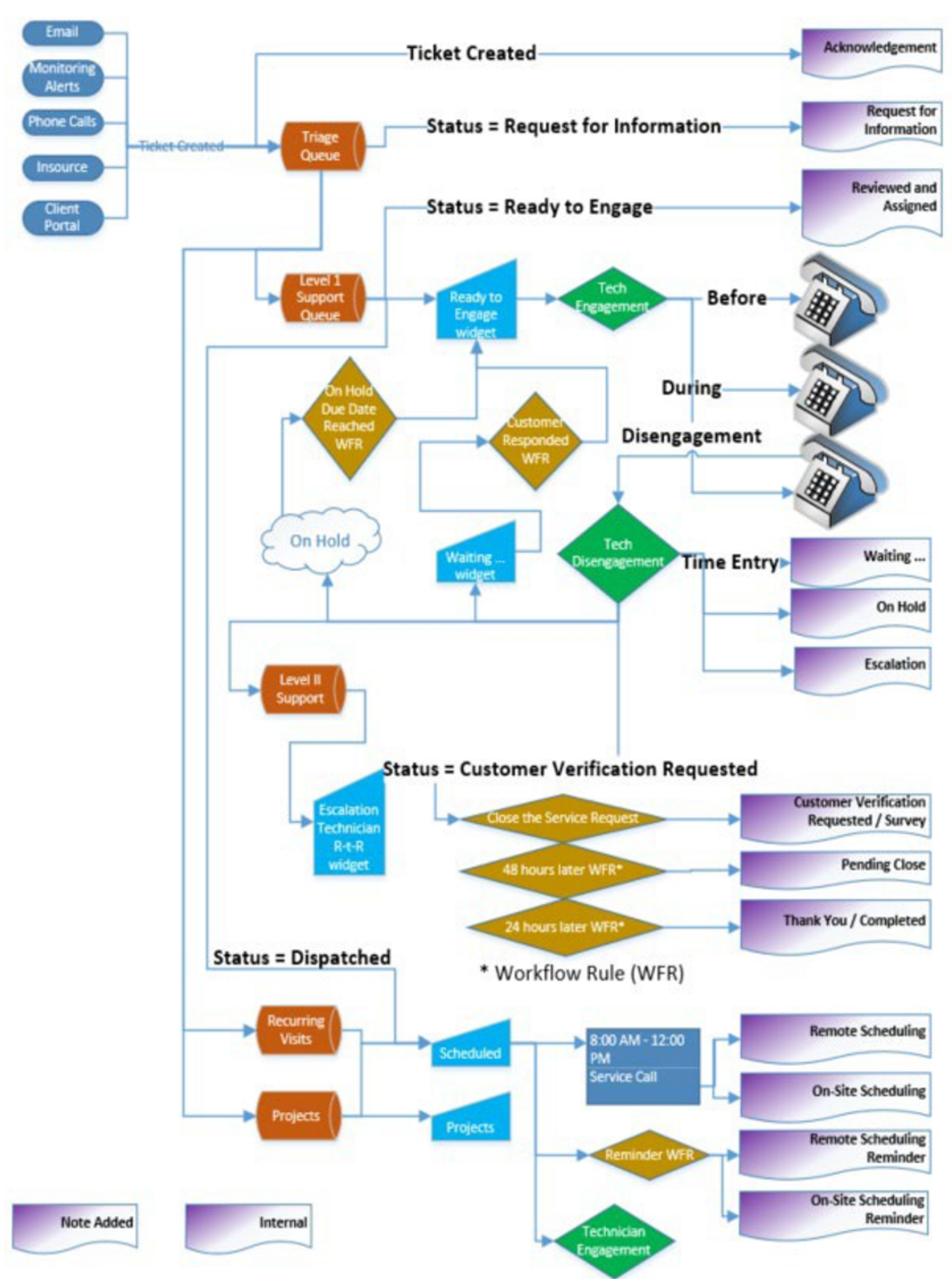
- How: automatic notifications (sometimes), by phone (always), and manual notifications (when needed).

Rich communication builds off of strategic decisions. Communicating the facts, and nothing but the facts, means thinking about the notification messaging and making it clear, concise, purposeful, and in a tone that represents the MSP and its culture.

Remember:
On a strategic level, knowing who to communicate with, what to communicate, when tocommunicate, and how to communicate is critical,and the first step in the process.

The message starts by clearly and boldly answering the question “Why am I receiving this email from you?”, including who you are, why you are notifying them, and what they need to know, what you are expecting them to do, along with a thank you...or two.

Customer-Facing Communication Protocol



Customer-Facing Communications Protocol training video:
https://vimeo.com/434664169/e412301200

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Dashboard:
A group of widgets that display real-time information used to track data that's changing on a weekly/daily/hourly basis.

Key #5: Advanced Dashboards: Provide techs and Service Coordinators with the tools to organize their day

Autotask does an AWESOME job providing default dashboards that provide typical knee-jerk reactions to the information we talk about. But, out of the box, Autotask's r goal is to show the potential of what dashboards can do, and how many different types are available.

They don't provide real-world dashboards to help you organize your day, as a useful tool should. For that, like segmenting requests, response SLA, and providing a great customer experience, you'd need to figure out how to configure the PSA software on your own.

The process we use to develop our recommended dashboards is:

1. Listen to techs and Service Coordinators to get an idea how they use their dashboards. As it turns out, most DON'T use them - they revert back to the queue view that's been around since Fred and Barney owned a MSP.

2.Ask them when they do look at their dashboard, which widgets do they look at, and why?

3.Verify which widgets aren't useful or relevant–and remove these immediately.

4. Ask what info would be helpful– and these immediately.

5. Show how a single widget can replace the queue view, and that by adding other widgets, they can have a more functional and meaningful workspace.

6. Introduce widgets that are off their radar, such as Kim Drumm's Team Total Hours worked widget, which shows who's doing Real Time Time-Entry, along with who isn't.

7. Move the most important widget to the top left.

The key here is to "keep the end in-mind". At the end of the day, we'd like techs and Service Coordinators to always know what to work on next and to be aware of all tickets for which they are responsible.

This means the most important widget should be thefirst one on the dashboard, and in the upper left-hand corner. For techs, it is the Ready to Engage widget which needs to be organized based on Sorted by the Next SLA Event Due Date field. Follow that by Service Calls Scheduled, and a list of tickets in a waiting status (Waiting Status Tickets).

For Service Coordinators, it's the Triage widget and needs to be organized based on Creation Date. Followed by SLA Summary, and a list of all tickets across all techs in a waiting status.

Thanks to our many customers over the years and from around the world, we've heard what meets the above criteria:

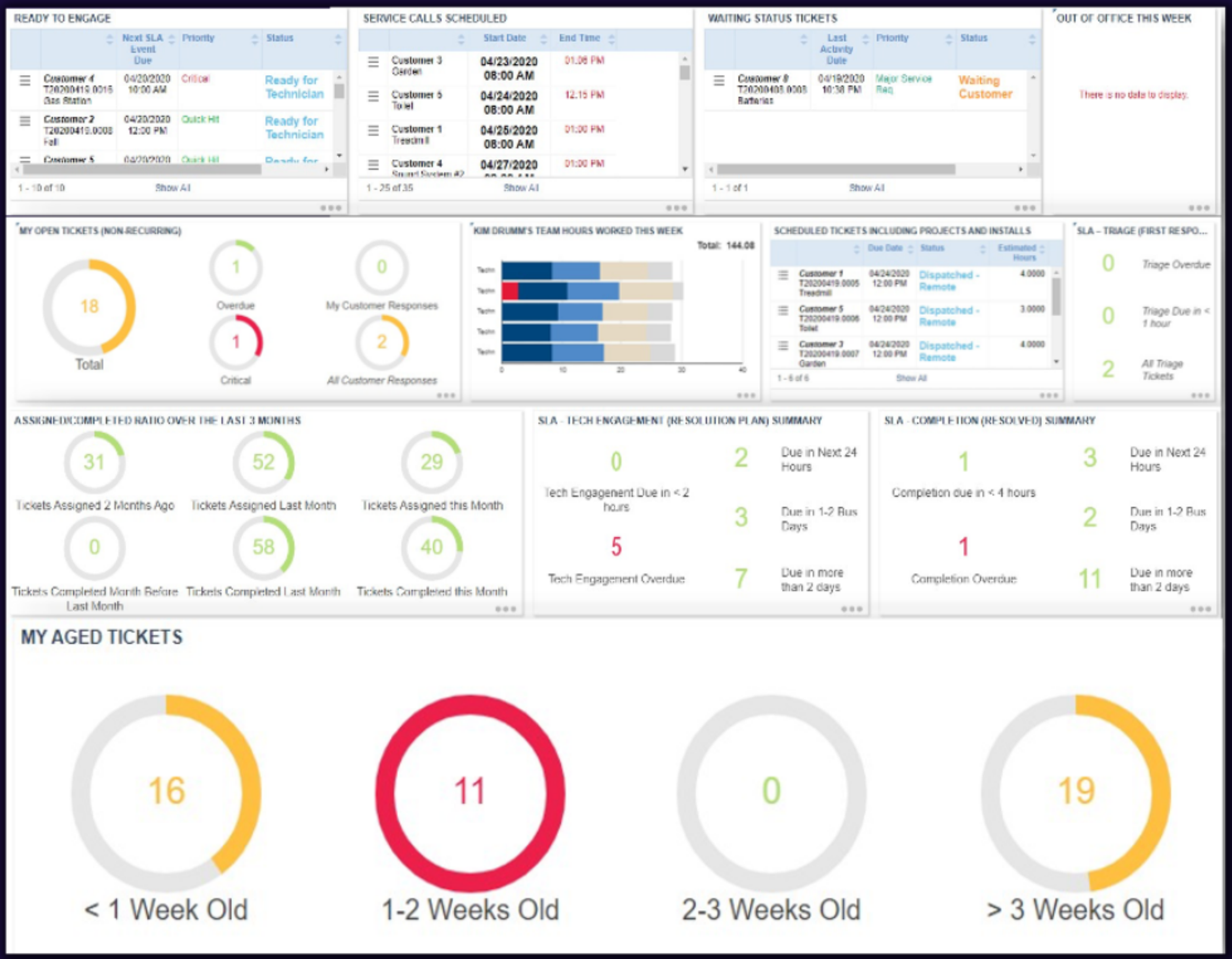
For techs, the Technician Dashboard consists of the following:

- Ready to Engage
- Service Calls Scheduled
- Waiting Status Tickets
- Out of Office this week
- My Open Tickets (Non-Recurring) by Total, Overdue, Critical, My Customer Responses and All Customer Responses)
- Kim Drumm's Team Hours Worked This Week
- Scheduled Tickets including Projects and Installs
- SLA – Triage (First response needed)
- Assigned/Completed Ratio over the last 3 months
- SLA - Tech Engagement (Resolution Plan) Summary
- SLA – Completed (Resolved) Summary
- My aged tickets

The Service Coordinator dashboard has the following widgets:

- Triage
- SLA Summary
- Out of Office this week
- All open tickets
- All waiting tickets
- All On-Hold tickets
- All Service Calls Scheduled
- Team Hours Worked this week
- Tickets requiring scheduling (Projects, Installs & Major Service Requests w/o Service Calls)
- Scheduled Tickets(a list of tickets that have a Service Call)
- Contracts Expiring over the next 120 days
- Completed Tickets pending Billing Review

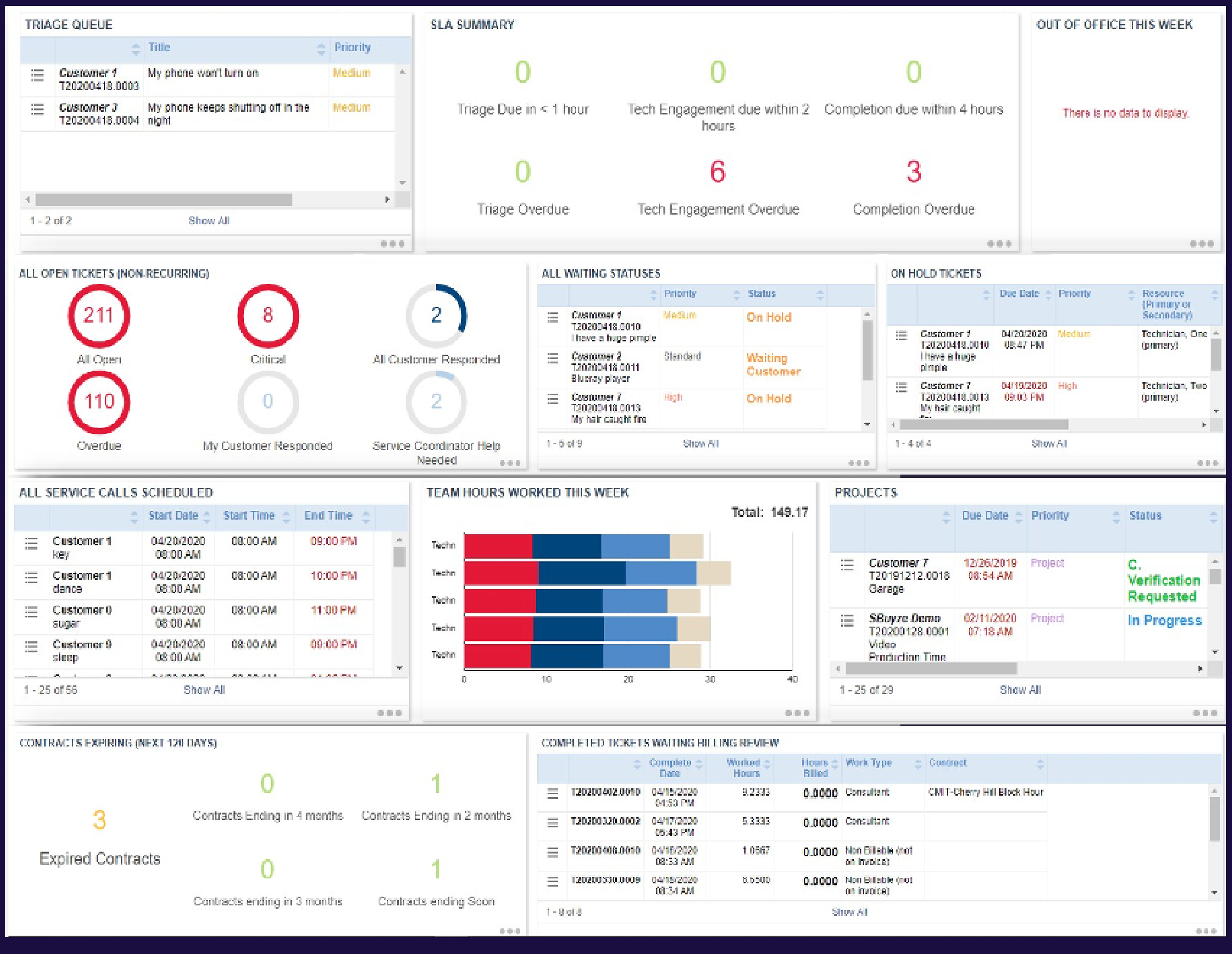
Remember:
For Service Coordinators, it is the Triage widget and needs to be organized based on the Creation Date.



Technician Dashboard

Use the link below to watch our Dashboard Training video:

https://vimeo.com/420383800/92d0b177a335



Service Coordinator Dashboard

"Steve has been excellent in taking the time to custom-tailor this report from the perspective of extracting the most value out of it as possible."

-ALEX SAMUEL
Director of Service, Innovative Inc.

Key #6: Labor Invoicing Automation: single time-entry field driving the billing process

The third level of PSA automation is Labor Invoicing Automation. By configuring the Labor Invoicing Automation, all the Support Team needs to do is communicate what type of work (Work Type) they did, and the time entry will flow through to invoicing flawlessly. The Approve and Post process is still an option, as well as an Account Management review, but the hours it takes to do these processes is reduced from hours to minutes (in my case at my MSP, process went from 12 hours to 45 minutes per AccountManager per month).

The Purpose of Labor Invoicing Automation
The purpose of Labor Invoicing Automation is to shift the burden of making sure all invoices bill correctly from the Support Team to the PSA, which provides two very profitable benefits:

First, it frees up the Support Team to focus on servicing the customer, not coding tickets.
The Labor Invoicing Automation streamlines the Service Delivery operation in two ways. First, it reduces the time it takes to code a ticket for invoicing purposes down to seconds. It does this by removing the necessity to review the Contract, SLA, Role, and Work Type fields numerous times in the flow, from New-to-Complete, down to one time per Time Entry.

Second, it increases the quality of the invoicing, and from our experience, can increase T&M billing up to 18%.
By asking/expecting the Techs to answer one simple question: "What Type of Work did you do?", the quality of the ticket coding for billing purposes will be in the 90% range.

This reduces the arduous Approve & Post process as well as account management and accounting personnel review time. Not to mention a reduction in the number of times the invoice leaves incorrectly and the hours it takes to apologize, reassure the customer you know what you're, and make the necessary accounting adjustments after the fact.

Increase revenue by 15% with Labor Invoicing Automation
Back in the day, Account Managers spent a day and half reviewing invoices before sending them out to the customers. What's wrong with this picture? A lot!

For one, this review kept them from selling, thereby reducing potential revenue by 15%. It also created hours of extra work for the accounting department - who then had to redo the invoices, including the hassle of un-posting and re-posting.

And that's not even the worst part of the process: From my experience, if an Account Manager found an error in favor of the customer, they quickly marked up the invoice for the accounting team to fix. However, if the error was found to be in favor of the company, the Account Manager would look the other way and blame the company for not knowing any better.

Case Study: How Labor Invoicing Automation increased profits by 18%

The monthly billing breakdown of the first customer we engaged with was 4% T&M and 96% for the MSA.

So, I asked the owner if all the customers were “All-In Managed Service Customers”? His reply was “Yes, why?”

“Typically,” I said, “even when all customers are under a MSA, T&M billing is around 20%.”

We then got right to work to reduce the tech’s ticket coding burden for billing purposes by asking them to answer one simple question:

“What Type of Work did you do?”

Within two months, the monthly T&M billing rose from 4% to 22%, as predicted, and we have seen this improvement many times since then with other customers.

You see, the problem is this: while an MSP can have all customers under a MSA (note: very few MSPs take this stance, but some do), if the MSA is an All-You-Can-Eat variety, there’s still a significant amount of work that’s billable and outside of theMSA.

Shout it Out Loud: ALL Work is Billable!

“ALL WORK IS BILLABLE! IF WE ARE ENTITLED TO BE PAID FOR THE WORK,THENIT IS BILLABLE!

HOW THE CUSTOMER GETS BILLED, MSA OR LINE ITEM ON THE INVOICE, SHOULD NOT BE A CONCERN OF THE SUPPORT TEAM.

IF IT IS WARRANTY WORK, BUSINESS DEVELOPMENT, OR IN SOME CASES TRAVEL, THEN YES, IT IS NON-BILLABLE. THE REST OF THE WORK IS ALL BILLABLE AND USES A BILLABLE WORK TYPE.”

-ADAM V. (FORMER SUPERVISOR)

Remember:
All work is billable!

ADVANCED GLOBAL MSP COACHING

What work could possibly be T&M billable with an All- You-Can-Eat agreement in place? The answer depends on the contract exclusions.

Some examples of typical contract exclusions are:

- Project work
- DR planning and drill execution
- Malware response
- Audit or other compliance work
- Security breaches

Not to mention...

- Afterhours
- Onsite
- Installs
- Major service requests
- Work covered by other types of contracts (Block Hour, Retainer, Per Ticket)

Step 1: Review the list of all customers billed over the last 6 months, including those with MSAs.

Building a labor invoicing Automation process starts with reviewing all Customers. We recommend pulling a list of all Customers worked for over the last six months and comparing that list to a list of all Customers with an existingContract.

Comparing Lists: A Customer Review

We merge the “Customers with contracts in Autotask” list into the list of “All Customers worked for” over the last 6 months.The combined list is then reviewed to make sure the Customers without contracts are truly T&M Customers at the Standard Role rate adjusted by Work Type.

You can tag all Customers without a contract as T&M, so you know they have been reviewed and that they are in fact a Standard Rate Customer. It would not surprise me that when doing the review, we come across a few Customers who have MSA’s, but not an active unexpired contract in Autotask.

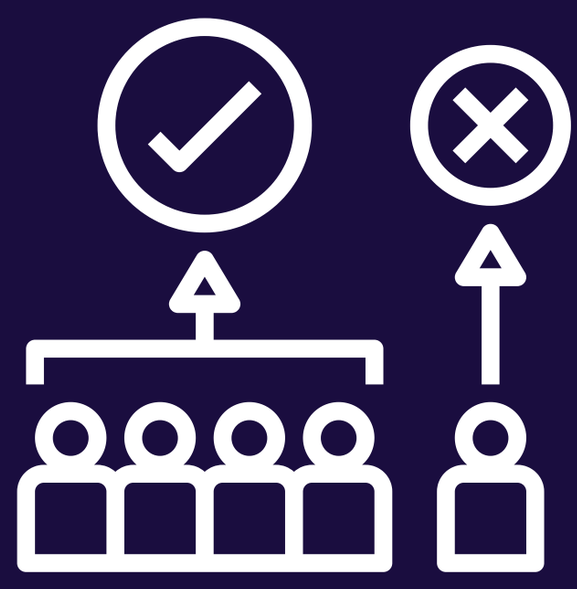
The purpose of this drill is to make sure all T&M Customers do not have a contract and all Managed Service Customers do have a contract in Autotask, even if the ManagedService Customer has a limitedType of Work at some other rate.

The “some other rate” could be lower, as in the case of offering a discount for work that is outside of the MSA, or it could be higher, as in paying a premium for extended hours or expedited service.

Note: Any time a Customer is to be invoiced at the Standard Role Rate Adjusted by Work Type, no contract is needed. They will be invoiced without any further adjustments. Keep in mind, what their invoices look like is based on the invoice template assigned to them at the Customer level.

Remember:
The purpose of this drill is to make sure all T&M Customers do not have a contract and all Managed Service Customers do have a contract in Autotask.

Step 2: Create a list of the Type of Work excluded from or limited in the MSA for each Customer



Once the combined list has been reviewed, and it's been verified that all Customers with agreements do in fact have a contract in Autotask covering the agreement, then we are ready to move on. The combined list can now be reduced to only those with some level of contract with the Company.

While not all agreements may be ManagedService Agreements (MSA), we refer to Managed Service Customers as any Customer with any type of agreement with the Company - including HaaS agreements.

In the second pass through, review the Managed Service Customers list, add a comment for each Customer (note:you will need to add a column for comments) with all of the Types of Work that are excluded or limited to in the MSA.

These exclusions/limits will play into having the time entry processed by an exclusionary level contract after being excluded by all the contracts that come before it in the cascade. How many secondary contracts are allowed?We are not sure, but we have built a cascade of 9 contracts: the primary MSA contract and 8 excluded secondary contracts.

Exclusion Sets Make Your Life Easier
Once all of the exclusions for each Customer have been listed in a comment field, group the Customers based on similar sets of exclusions. Then voila, each Level of Service (platinum, gold, silver, & bronze or whatever naming convention you are using) starts to appear as well as how Exclusion Sets should be configured.

Exclusion Sets are used to make contract creation easier. When creating an Exclusion set it's easier and faster to choose the set rather than using individualExclusions. This is especially true if you have a long list of exclusions (Projects, After hours, On-Site, Travel, etc.) that are common across multiple Customers (a package service level).

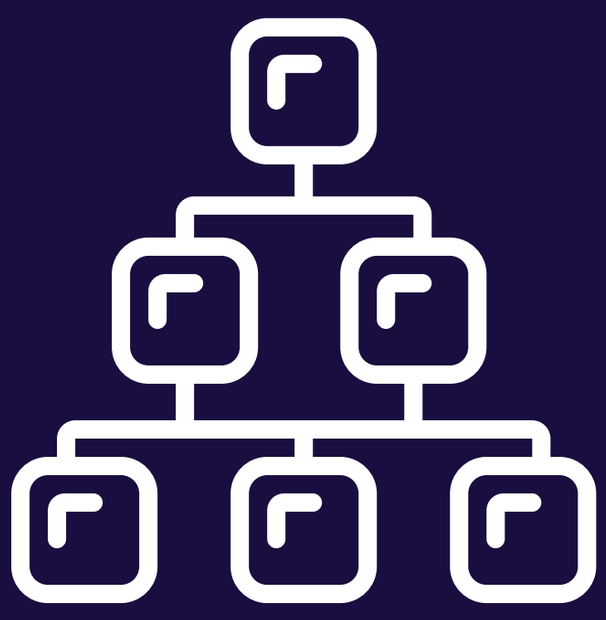
Relax! At this point, what to do with the exclusions is not very important. Finding and knowing all the different types of exclusions that need to be accounted for is what matters most. With the list of exclusions in hand, making sure there is a Work Type for each comes next.

Before you go:
Side Note: Before throwing the list of all Customers with an existing Contract away, double check the contract fields that impact the Service Delivery Team, specifically the ones the Response SLA Automation depends on.

Here is the list. Make sure:

- All active Contracts are not beyond their end date.
- All Customers have a Default Service Desk Contract.
- All Contracts have a designated Contract Category.
- All Contracts are assigned an SLA.

Remember:
When creating an Exclusion set it's easier and faster to choose the set rather than using individual Exclusions.



Step 3: Create a Work Type for each exclusion or limit in the list

With the list of exclusions in hand, make sure there is a coinciding Work Type as well. By excluding a Work Type out of the Primary Contract, it will either be invoiced at the Standard Role Rate adjusted by the Work Type or picked up by an Exclusion Contract.

**Note: the phrase “Type of Work” does not refer to the services provided, but to the types of tech work. For example:

- Project work
- After hours work
- Onsite work
- Travel
- Remote work limited to ## hours
- Any other Type of Work excluded or limited in the MSA agreements

A Word About Roles:
Before going on to discuss Work Types, we need to talk briefly about Roles. Roles are rates based on a skillset, as opposed to the Type of Work that is being performed. A Role is the set Standard Rate the Company charges for each level of skill needed to do the work.
The goal of a Labor Invoicing Automation is to reduce the invoicing burden on the Support Team as much as possible. Reducing the number of Roles to as few as possible (even to one, if possible) lessens the burden on the Support Team. As long as the Standard Role Rate is the same between Roles, only one is needed.

For example, some common Roles are:

- Technician @ $150
- Sr. Technician @ $175 Engineer @ $190
- Architect @ $225

Take special note that each has a significant difference in skill level, and each bill at a considerably different rate.

Work Types:What are they?
Work Types adjust the Standard Role Rate based on the Type of Work being performed.

Some Examples of this are:

- Remote Support @ Standard Role Rate
- Onsite Support@ Standard Role Rate, but Excluded from some contracts**
- Projects @ Standard Role Rate x 1.25
- After hours / Emergence @ Standard Role Rate x 1.5
- Network Administration / Technology Audits @ Standard Role Rate x .85

**If there are no contracts that exclude onsite work, then a Work Type “Onsite” is not needed. Just call the Remote and Onsite Support “Support” and only have one Work Type, unless of course Onsite work bills at a different rate than Remote work.

If the ratio of Remote work to Onsite work is needed for some reason, there are other ways to mine the data for this information. In all the years Advanced Global has been in business working with Customers around the world, this ratio has never been requested. Please do not make the burden of invoice quality any harder on the support team than necessary.

Remember:
Take special note that each has a significant difference in skill level, and each bill at a considerably different rate.

To Summarize Roles and Work Types...

Roles are the Standard Rates charged to Customers without Contracts based on the skills needed to do certain classes of work.

Work Type overrides and adjusts the Standard Role Rates and is used to exclude certain types of work from contracts.

Contracts override both the Role and Work Type in the Time Entry and are used to adjust the invoice billed to the Customer based on Contractual Agreements.

The three work together to make sure the Customer's invoice is fair and reasonable. This is based on the relationship with the Customer and on the contractual obligations.

A Reminder About Labor Invoicing Automation:
In order to improve the quality of invoicing, and therefore the Customer experience, we use Labor Invoicing Automation. Labor Invoicing Automation works best when the burden on the Support Team is reduced as much as possible.

Reducing the burden is done by decreasing the number of Roles (having only one Role if possible)and expecting the Techs to answer one question: What type of work did you do?

That is a reasonable expectation and manual time entry requirement. This creates a situation where Work Type is the pivot point of shifting the burden from the Support Team to the PSA Software.

A note about Services:
We find that very few MSPs are tracking which Services are being worked for in the tickets, and for good reason. It's a burdensome, manual process, and one that provides very little value. Tracking Services in the tickets does not flow through to invoicing.** If the reason for tracking Services in the tickets is for profitability reporting, there may be other more effective ways to get to the information you need.
However, if the MSP would like the Autotask Standard Profitability Reporting running, then it is best to have the Service Coordinator set which Service applies to the request as part of the Triage process.

This is a manual process. From our experience, no one will look at, double check, or even question if the right Service has been applied to the ticket or not.
My guess is, the information will at best only be 80% correct, which is enough to base decisions on, but not enough quality to report profitability.

**Note: this is not to say the services attached to the Contract do not impact billing - they do that by setting the MRR rate. But the labor associated with the Services attached to the ticket do not flow thru to billing at the Services level, they flow through at the Contract level.

"There's a lot of automation that can happen that isn't a replacement of humans but of mind-numbing behavior."

-STEWART BUTTERFIELD

Step 4: Create Exclusion Sets for each level of service

Before building the Labor Invoicing Automation template, it is a good idea to bundle the Work Types excluded or limited for each Level of Service into an Exclusion Set.

Some MSPs also build an Exclusion Set for each Secondary Contract in the Cascade. For Example:

- Gold Level Primary Exclusion Set (Project, Onsite, After hours)
- Gold Level Onsite Exclusion Set (Remote, Travel, Project, After hours)
- Gold Level Project Exclusion Set (Remote, Travel, Onsite, After hours)
- Gold Level After hours Exclusion set (Remote, Travel,Project, Onsite)

If Exclusion Sets are created for the Secondary levels of Exclusions, then both Primary and Secondary can easily be pulled into the correct set for each template when creating the Contracts.

Now that we've discussed the list of Exclusions, a few Roles, the Work Types needed, and built the Exclusion Sets, we are ready to jump in and start building the cascade...

Get ready to see 15% increasedRevenue, while also boosting Profits by another 18%!

Step 5: Create a set of Contract Templates in the Zero Account

Now it's time to gather all the information needed to start building the Labor Invoicing Automation.

Now you're probably wondering: what is the next step? Cutting the time to it takes to create the Contracts in Autotask by 75%? With all these savings and now reducing the Contract Creation work, what else is left to do but sit back and drink Pina Coladas?

Well, since you asked...we're not quite finished just yet.

Haven't we said that we are all about...

GUIDING IT MANAGED SERVICE PROVIDERS THROUGH THE PROCESS OF SERVICE DELIVERY IMPROVEMENTS SO THEY HAVE THE FREEDOM TO GROW THEIR BUSINESS?!!

...THIS RESULTS IN IMPROVING THE QUALITY OF WORK-LIFE FOR THEIR EMPLOYEES, INCREASING CUSTOMER SATISFACTION, AND BOOSTING PROFITS.

In this case, the person tasked with creating contracts work-life is easier and the Customers are happy, having received the correct invoice.

The process is simple: Build the first set of Contracts in the Zero (your Company's) Account.** By set, we mean one of every type of Contract that the MSP offers or needs to create in order to comply with the MSA agreements. For example:

- Recurring Services
- T&M
- Block Hour
- Retainer
- Per Ticket (we have never seen anyone use this type of contract)

These contracts will be referred to as Templates, and when creating the Labor Invoicing Automation templates, use the copy contract wizard to change the Contract name and you are done.

**Note: It is called the Zero Account because if you look at the Account ID, it is 0. This is done intentionally and is how the software knows when you are working for yourself.

Step 6: Create a Labor Invoicing Automation Template in the Zero Account for each level of service

Next, out of the set of contracts, build a Labor Invoicing Automation in the Zero Account for each level of service needed. Once the Labor Invoicing Automation is built, you can copy the whole contract to the Customer accounts by using the copy wizard for the Primary Contract.

Which Type of Contract to Use for the Primary Contract?
Where to start? What type of Contract is Primary? Relax, at the end of the day, it does not really matter.Normally, the primary MSA contract is a Recurring Services contract, but this is not a requirement. We have built a Labor Invoicing schema using a Block Hour, T&M, and Retainer contracts as a primary agreement. We have also used Recurring Services contracts as a secondary to a primaryMSA contract.

Our recommendation is to start with the type of contract that is going to see the most action (Customer Requests/Tickets). The Primary will be theDefault Service Desk Ticket, and if it is the right contract, for most requests, then there is a lesser chance of something not being coded right and the billing not correct. Follow this logic as you build the cascade so that the first secondary contract is then the second most used contract and so forth.

Note: The beauty of Autotask contracts is how robust they are. Outside of dealing with Taxes, we have not heard of a Customer contractual agreement in which the Autotask module could not handle the Labor Invoicing Automation. We have had the honor of guiding an MSP through the process of setting up a 9-level Autotask Labor Invoicing Automation.

There is also no limit on how many Block Hour, T&M, etc. secondary contracts there can be in any one cascade for any one Customer. In other words, Sales can be as creative as they want, sell whatever theCustomer will agree to pay for, and the Autotask PSA Labor Invoicing Automation can handle it. This includes quarterly block hour agreements with true up QBR processing.

Remember:
Our recommendation is to start with the type of contract that is going to see the most action...

ADVANCED GLOBAL MSP COACHING

Consider the following:

- We can sell anything, once the agreement is signed
- It doesn't matter how convoluted the agreement is
- Nor does it matter what type of contract is primary
- We can have as many of each type of contract as we want
- And as many total contracts in the cascade as we need

Starting with the Contract that has the most anticipated labor is usually in your best interest because Labor Invoicing Automation is all about capturing the labor and making sure it bills correctly.

- What it is not about: Burden, Services, Frequency, Consumption, or Assets.
- What it is about: Labor, and the Approve and Post- processes.

Therefore, it makes sense to be sure the 1st Contract in the Cascade is the one that is going to see the most amount of Labor, if for no other reason.

Once the type of Contract has been determined:

- Search the Zero Account for the Template.
- Over the (Hamburger) menu selection to the left of the Contract, select Copy Contract Wizard, and build the Primary Contract into the Zero account.
- After the Contract is created, go back & add the Type of Work excluded from the Primary Contract and any other common contract configurations (services, charges, etc.) for this level of service.

Note: Most likely, for each Type of Work excluded or limited from the Primary Contract that is not excluded from the Standard Role Rate adjusted by the Work Type, there will be an exclusionary contract. Sometimes you can double up, but not often.

HOW TO DETERMINE THE FIRST EXCLUSIONARY CONTRACT

So which Contract is the first Secondary (exclusionary) Contract? The one with the next most amount of anticipated Labor, for the same logical reasons as selecting the Primary Contract!

What Type of Contract will it be? It depends on the terms of the exclusion:

- Rate Adjustments – T&M
- Block Hour or Retainer – Duh
- Ticket Count – I doubt it, but maybe
- Fixed Price – No. Hold these to the end
- Recurring Services – Could be…

Follow the same process as you did for the Primary Contract, including adding the exclusions after running the Copy Contract Wizard.

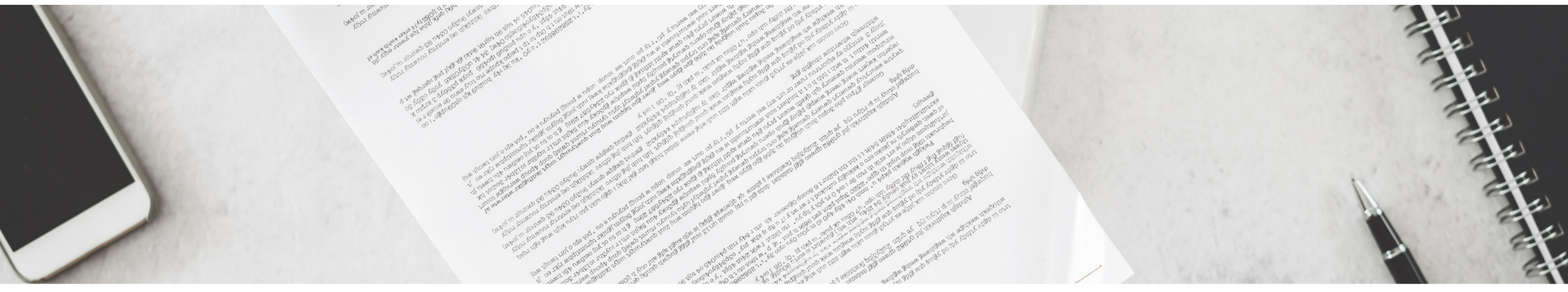
Continue this process until all Primary Contract exclusions have been addressed. Now, work backwards through the Cascade, linking the newly created Secondary Exclusion Contracts until the Primary Contract has an Exclusionary Contract assigned/linked to it.

Celebrate! You are done. This Labor Invoicing Automation template is now ready to be copied, using the same copy wizard, into the Customer accounts.

Note: Once you're comfortable with the process, you can start with the end in mind and create the last Secondary Exclusionary Contract first and build the Cascade backwards.

The advantage of doing it this way is that the next Secondary Exclusionary Contract is created first, and you can add the Labor Invoicing Automation linkage as you go, instead of two passes through the process.

After creating the first Labor Invoicing Automation template, feel free to go on and create the Customer-Facing Labor Invoicing Automations or circle back and build another template for the next level of service.



Step 7: Use the Copy Contract Wizard to create the contracts for each Customer

- Search the Zero Account for the Labor Invoicing Automation Template.
- Over the (Hamburger) menu selection to the left of the Primary Contract, select Copy Contract Wizard, and build the Primary Contract into the Customer's account.
- The Copy Wizard will ask if you want to also copy the Secondary Exclusion Contracts – please answer "Yes".

A Must-Know About Fixed Price Contracts
From our experience, Fixed Price Contracts are mostly used for projects. If so, they should be at the end of the line. The reason for this is that they are short lived and usually far shorter than the MSA.

By adding them at the end, you can activate and inactivate them at any time during the MSA time period without disrupting the cascading stack. If a Fixed Price Project Contract is added to the middle of the cascade, the exclusion contract designation needs to be changed to the contract that comes before and after it, and vice versa when inactivating the contract.

And Some Notes on Inactivating Contracts...
When contracts expire, they need to be either renewedor inactivated. Just because a contract reaches its end date, it does not automatically inactivate.

Also, inactivating a Customer does not disable their contracts. For those who do not know what inactivating a Customer means, this is a concept that means a Customer decides to go see if the grass is greener on the other side of the hill.

Of course, we know this has never happened to you, but when it does, relax, give them a good send off, and remember they will be back when they see what looked like green grass was actually plastic.

Just One Last Thing...we promise!
At the end of the Cascade, if there are still situations not accounted for, they will just invoice at the standard rate. As a matter of fact, anytime the Customer is to be invoiced at the standard rate, just exclude the type of work, and the standard rate will apply.

Step 8: Educate (or Re-educate) the Support Team on when to use which Work Type

You've built this great Labor Invoicing Automation, but it doesn't quite seem to be providing all the benefits touted...

- The ratio of T&M to Managed Services support remains about the same (2% to 98%).
- Sales & Accounting personnel are still spending about a day and half per billing cycle cleaning up the invoices.

Hmmm. What went wrong, you ask?

Communication is Key at Every MSP
Forgetting to communicate – go figure...
It's not a well-kept secret in the MSP industry that the Sales side of the house doesn't collaborate well with the Service Delivery side. If this isn't true within your organization – kudos to you and to your leadership – keep up the good work.
But if you need guidance on how to lead your organization to a Sales/Service Delivery collaborative environment – call us! That's what we specialize in.

If this is the case, relax, it's easy...really! All you need to do is ask the techs to answer one crucial question–

"What type of work did you do?"

Insist that they do Real-Time Time Entry, and when they're adding their notes and time into the ticket, expect them to review and adjust the Work Type.

Wait, Real-Time Time Entry is a myth, you say?! Not at one MSP that we are aware of, and several others we are in direct communication with.

Read on for the process they used to successfully groom the Real-Time Time Entry habit.

Case Study: A Real-Time Time Entry Success story

One of our customers, to change theirTech's Real- Time Time Entry habits, instituted a Document Detention policy.

Here's how it works:

- Document Detention was announced by the owner in an all-staff meeting.

- April served as a transition month, and starting in May, Document Detention would include docking their pay.

- At the end of the workday, the Service Coordinator (the Bad Cop) would check the amount of time in timesheets for the day.

- If techs didn't have more than six hours of time in, the Service Coordinator would inform them that they need to report for Document Detention.

- Informing the tech that they needed to report for Document Detention, included a Zoom invite (they were a dispersed workforce) and a message that the owner was waiting for them.

- Not sure what would happen if they did not report, as the owner did not have to cross that bridge.

- When they did join, the owner (Good Cop) welcomed them. He then asked them what they did today and offered to assist them as they update the documentation in the ticket and added their time entry.

The Results:

- In the first two weeks of April, about half the techs needed to report each day - different sets of techs each day, and all of them by the end of the first two weeks.

- The last two weeks there were a few techs, with no more than two techs per day.

- In May, the techs hit it out of the park with no Document Detention attendees.

- The Service Coordinator continues to check Kim Drumm's"Team Hours Worked This Week"widget each day.

- The owner is expecting old habits to creep back in, but so far, so good.

- Also, Advanced Global's Real-Time Entry Report makes it easy to keep tabs on the Team and having follow-up coaching calls with the Techs.

How to make Document Detention work at your MSP

A key component of making Document Detention work is the “walk to the principal's office,” as we like to call it. Having a Support Team Lead, Service Coordinator, or Manager inform the tech that they have been flagged for Document Detention and are expected to report to the owner who is waiting for them. This is the reminder needed for the techs to change their habits.

Alas, calling them professionals should have been the trick, as it calls them to a higher level of performance. But, somewhere along the way, a disconnect between doing your job as a professional and Real-Time Time Entry seemed to develop. It happens...

One other note, while the Support Team member throwing the flag is the bad cop, the owner gets to play good cop, putting their arms around the tech and encouraging them to do their job in a more professional way.

Service Coordinator review:
Get excited, because this is going to be your last and final step: Have the Service Coordinator review all time entries on the way to Approve & Post. We have said many times: the Service Coordinator is the hub of the Service Delivery operation and maybe the company as a whole.
We’ve also said if the MSP has 3 full-time techs or more, having someone in the service coordinator role will pay for itself.

In this case, the Service Coordinator is the only person in the building who knows more about what has happened to the customer’s request in its journey from New-to- Complete than the tech that engaged and completed the work.
Which means they’re best positioned to review time entries for billing purposes.

What does it take to empower a Service Coordinator to do their job?

Prerequisites with owner's sign-off or the Service Coordinator position:

As we now know, the Service Coordinator is the hub of the company. If this person is not empowered to do the Service Coordinator job, then no matter what the rest of the team does, the customer will be disappointed, and chaos will reign.

1) The Service Coordinator also needs to be the Single Point of Coordination (SPoC) for all customer requests, which means they must have a complete ownership of the techs calendar, work day, and duties.

2) Service Coordinator daily duties are reviewed, adjusted if needed, and accepted.

3) The Service Coordinator is one of 3 Autotask System Admins and needs to know how to maintain the following Autotask configurations:

- Dashboards
- WFRs
- Holiday Sets Updated
- Renew Live Report Schedules
- Administering Client Portal Access

Automation:
Throughout this eBook, we have referenced four levels of PSA Software automation:

1) Workflow Rules – the Hemi of PSA software.

2) SLA automation – a proactive way to organize tickets based on contractual agreements.

3) Labor Invoicing Automation– a process by which the Support Team indicates what Type of Work they did, and the invoices automatically and correctly bill the customer.

4) Live Reports – the scheduling of Live Reports can automatically be delivered to the people that need to know how tickets or performance is tracking, so adjustments can be made without management intervention.

Summary:
Believe it or not, this is only the midpoint in the journey to Service Delivery optimization. It lays the foundation necessary for management to hold the Service Delivery team accountable. And it provides the tools, organization, and processes required to drive the chaos out of the MSP's workplace.

However, the work is not done. Once a solid foundation is built, then management can go to work, including:

- Key #7: Empowering Service Managers to Manage
- Key #8: Project Management expertise
- Key #9: Pro-Active Maintenance Program
- Key #10: Knowledge Centered Support

With all ten keys in place, the owner is free to focus on growing the company. However, owners are only human after all (sorry to bust your bubble!) and in order to relax and do their job, they need to know Service Delivery is operating like a well-oiled machine, full of peace and harmony.

So, how can an owner (or anyone) tell if the Service Delivery operation is optimized, be relaxed and in their comfort zone, and/or feel like they're in control?

Remember:
Once a solid foundation is built, then management can go to work.

Borrowing from what has worked well in Lean Manufacturing: Service Delivery operations are optimized when 3 key factors are met:

1) Inventory (Labor resources) is fully utilized (80- 85%).

2) Throughput is minimized – Mean Time to Resolve (MTTR) - average of 2 business days.

3) Efficiency is maximized – Reactive Hours per Endpoint per Month (RHEM) is below 0.25 (or 2 techs per 1,112 endpoints under management).

To track these key metrics, Autotask Live Reports are now able to provide the information needed to manage the company.

Here are 3 KPI Live Reports that impact the bottom line:

- Advanced Resource Utilization (ARU)
- Advanced Mean Time To Resolve (MTTR)
- Advanced Reactive Hours per Endpoint per Month (RHEM)

The proof is in the pudding, and in this case the final seal of approval on profitability is an improving month-over-month trend Advanced MSP Profit Maximizing Evaluation for the last6 months.

Your Next Steps:

Overwhelmed because it feels like there is SO much to do?

Maybe you're not even sure exactly where to start.

It may seem that there are many different ways to begin improving.

But there is only one...and it's a simple start:

Of course, we're here to help. Don't wait any longer. Profit is being wasted. Schedule a call today for more information on Advanced Global's FREE No-Obligation PSA Configuration Evaluation

ThankYou:

Thank you for taking the time to read Unshackled: Freeing an MSP from Service Delivery Issues so the Company can grow.

ADVANCED GLOBAL MSP COACHING

About the Author

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With over 30 years of resource planning, process re-engineering,
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Stephen is a student of Demming's TQM, Covey's principles of leadership, and Hall's innovation engineering. He is certified by PMI as a PMP, HDI as a KCS & CSL, and Autotask Certified Consultant Partner.

Learn more at www.agmspcoaching.com/about-us

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MSP COACHING

Our Mission

Is to Coach MSPs on Fully Leveraging the Autotask PSA software, because every MSP deserves to thrive.