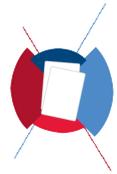


STREAMLINING SERVICE PROVIDER OPERATIONS

Using IT Service Management Software to Improve
8 Key Business Processes



STREAMLINING SERVICE PROVIDER OPERATIONS

Using IT Service Management Software to Improve 8 Key Business Processes

Introduction:3

When to Deploy an IT Services Management Software Solution.....4

Managing Customer Information.....5

Capturing and Converting Managed Services.....5

Implementing Automated Workflow, Escalation and Service Level Agreements.....6

Processing Customer Service Requests.....7

Implementing IT Consulting Engagements.....7

Monitoring and Billing Field Service Time.....8

Going Mobile to Optimize Service Tech Utilization.....9

Billing & Invoicing Cycles, Where the Rubber Meets the Road.....9

Pulling it All Together Over the Web.....10

What Software Should You Consider.....11

IT Business Process Reality Check.....12



INTRODUCTION

In this age of high tech solutions, increasing automation and pervasive access to the Internet, it is extremely surprising to see how many IT Solution Providers (SPs) – including MSPs, VARS, retail technology providers, system integrators, IT consultants, VoIP solution providers and ISVs – continue to rely on spreadsheets, whiteboards and manual or homegrown solutions to run their businesses.

The pressure on SPs – to do more, know more and work more efficiently with fewer mistakes – continues to rise as new hardware and software technologies are introduced at an accelerating pace. In the absence of efficient, purpose-built systems to manage your internal processes, you simply can't maximize your productivity and profitability. You spend too much time solving non-billable problems and playing catch-up to meet deadlines and due dates.

Several years ago, a new breed of application emerged known as Professional Services Automation (PSA) or IT Service Management Software, and it has evolved dramatically since then. Today, next-generation IT Service Management solutions are fully-hosted and delivered on-demand. And, because they are accessed directly through the Internet 'cloud', they're device independent and available from the office, in the field or on the road.

These specialized applications integrate several important business modules – including customer relationship management (CRM), project management, service desk, time tracking, inventory, billing and reporting – that all run off the same database, giving you a '360-degree' view of your customers and your business, all in one place.

Leading packages will be highly flexible and allow you to configure them to support your unique business processes and requirements. For example, individual modules can be turned on and off, and individual users can be given different levels of access to, and views of, your data, depending on their function. Most will also be able to integrate directly with other general business applications such as Microsoft® Outlook, Excel and Word, accounting packages like QuickBooks®, and managed services applications, such as Kaseya, GFI MAX, Level Platforms and N-able.

Of the many significant benefits of implementing an IT Services Management Software solution, the one that stands out above the others is the automation and integration of all your business processes – giving you a full view of critical metrics in real time, so that you can run your business better and:

- » Understand your entire sales pipeline and track your performance against goals
- » Determine what's due, what's done, what's overdue and what's at risk
- » View all work being done for a given customer, including design, development, implementation, support and professional services
- » See a 'big picture' roll-up of your complete portfolio of projects and development work
- » Drill down to any level of detail, to analyze which customers, services or projects are profitable – and which are not
- » View staff and tech availability, resource utilization and billable hour reports
- » Analyze how individual team members are performing

THIS WHITE PAPER DESCRIBES HOW TODAY'S END-TO-END IT SERVICE MANAGEMENT SOFTWARE CAN HELP YOU TAKE CONTROL OF THE KEY BUSINESS FUNCTIONS CRITICAL TO MOST SPs, INCLUDING:

1. Tracking customer information from prospect, through new customer setup to service delivery and billing
2. Keeping every task, project and new installation on track and within budget when implementing IT and software consulting engagements
3. Processing customer service requests with streamlined workflow and automated notification, and enabling direct client access
4. Capturing and converting managed service alerts into service tickets that are tracked from diagnosis through escalation to resolution
5. Tracking and real-time monitoring of billable time that field service technicians spend on support, break-fix calls and scheduled maintenance
6. Approving and invoicing all project and service work, including expenses, with the flexibility to handle monthly service, block hours, time-and-materials, or fixed-price contracts
7. Optimizing service tech utilization with an eye toward better profits and higher customer satisfaction
8. Rapidly producing business reports and metrics that provide the granular information needed to make real efficiency improvements.

WHEN TO DEPLOY AN INTEGRATED BUSINESS MANAGEMENT SOFTWARE SOLUTION

The days are gone when an SP could hope to run their business well because 'everyone knows what everyone else is doing.' Today, expanded service offerings and more complex client demands make it difficult for even the smallest provider to get by with the status quo. As the number of services offered and the number of service-related employees increase so does the complexity of your business, and the volume of items that need to be tracked simply exceed the ability of any owner or director to effectively manage them all.



THERE ARE MANY WARNING SIGNS THAT APPEAR WHEN THE SERVICE SIDE OF AN SP IS IN NEED OF AN IT SERVICES MANAGEMENT SOLUTION. AMONG THE ISSUES THAT ARE LIKELY TO SURFACE ARE:

- » Inefficient business processes are holding back growth
- » Profitability is lacking and you don't know where to look for improvements
- » There's no easy way to quickly understand what's due, what's done, what's overdue, who has time or what's at risk
- » Important implementation deadlines are missed
- » Billable hours on projects and service tickets are not properly accounted for
- » Expenses fall through the cracks and never get billed to the customer
- » You find it impossible to accurately track and bill customers because you use so many different billing methods, rates and rules
- » Your customers are unhappy about your responsiveness, communication and level of service
- » Your monitoring software is producing alerts, but follow-through, escalation and resolution do not consistently meet service level agreements (SLAs)

THE AGGREGATE LOSS IN REVENUE AND ASSOCIATED INCREASE IN COSTS ADD UP TO SIGNIFICANT DOLLARS. FOR EXAMPLE:

- » A 20-person IT consulting firm lost almost \$15,000 on one contract because they simply could not capture and bill the customer for indirect costs related to the project.
- » A managed services firm with over 45 employees wasted more than three days of staff time each pay period manually processing paper time cards.
- » An outsourced IT services firm found it was not accounting for about 15% of its billable time.
- » One fast growing Solution Provider began losing customers each month because they couldn't manage their growth and provide the same outstanding customer service that they could when they were small.

The ability to capture and process critical business information quickly saves both dollars and time. If you are wondering if you are a candidate for IT Services Management Software, take the short quiz at the end of this white paper.

The balance of this paper examines the eight most critical business issues affecting SPs, and how IT Services Management software can be deployed to streamline business operations and boost both productivity and profitability.

BUSINESS PROCESS #1 MANAGING CUSTOMER INFORMATION

One of the most serious challenges facing SPs is the need for a powerful, integrated system to manage customer information. Many SPs still have their customer data scattered across multiple computers in multiple databases. Prospecting and sales information is stored in contact managers, like ACT!®, Goldmine® or Salesforce.com®. Billing information is locked up in dedicated accounting packages, like QuickBooks. Project information, if stored at all, is often in project management software packages, such as Microsoft Project. Service history is often found in saved e-mails from customers, or stored in some stand-alone service desk software.

Most IT Services Management Software programs include a robust Customer Relationship Management (CRM) module that goes far beyond the capabilities of stand-alone applications. In addition to basic contact management functions, here's what you can expect from the CRM features of IT Services Management software:

» Better Management of Customer Information.

A good IT Services Management package provides a single integrated view of your sales prospects and customer information. Anyone in your organization with permission should be able to see notes, history, contacts, opportunities, check on project status, view installed products and monitor service tickets and ongoing communication. Productivity features should include user-defined fields (to let you track the information that is uniquely important to your business), automated notification and workflow rules. With all your customer information entered single application, you can track and report on just about anything with a few clicks.

Today's IT Services Management Software is web-based, and provides bi-directional synchronization of all customer and prospect data, service calls, appointments, notes and more. This gives you the ability to update a customer's status and other critical information at anytime from anywhere using a standard web browser and mobile device.

» Improved Sales Opportunities & Reporting.

Make sure you can accurately track sales in progress. Using a sales dashboard enables up-to-the-minute lead tracking, sales metrics, sales quota performance, territory management, pipeline reports and reports that are easy export to Microsoft Excel for more analysis. It is also important to have configurable sales reporting for multiple locations and security for outside sales representatives. Look for a system that complements IT services procurement tools like ChannelOnline or QuoteWerks.



» **Streamlined Business Workflow.**

One overlooked area is using IT Services Management Software to improve internal business processes. For example, you can use service ticketing queues to track RFQ's, project proposals and RMA's. Another is to use the project management tools to speed up and track new customer setup. This will help eliminate the likelihood of missing important data or steps by generating check-off lists for the detailed tasks to be accomplished, and assigning the people to do them.

» **Microsoft Outlook Integration.**

Be sure your IT Services Management solution offers real-time integration from within Microsoft Outlook for contacts, calendar items and e-mail. This will eliminate the need to create and maintain separate contact databases. To accurately track and respond to customer e-mail requests, Outlook integration that can convert e-mails to tickets is a big time-saver for help desk and support technicians.

» **Tracking Installed Products and Subscriptions.**

Beyond core customer information, you should use your IT Services Management Software to track customer products and assets, subscriptions, installation dates, serial numbers and other product and site-related configuration data. In addition to the obvious time and organizational benefits, managing and tracking customer inventory data efficiently, like warranty expirations, can create significant new sales and service opportunities.

**BUSINESS PROCESS #2
CAPTURING AND CONVERTING MANAGED SERVICES**

SPs derive revenue by providing 24x7 managed services for monitoring networks, virus and security alerts. These IT monitoring systems create alerts and warnings at several levels. When severe alerts come in, they often require immediate attention and speedy resolution.

To streamline the process, alerts should automatically convert to into meaningful service tickets so they can be tracked through the process in your IT Services Management software, saving time to triage and create a ticket.

Critical problems that fall through the cracks are a primary cause for client dissatisfaction and attrition. To make sure that no critical alert goes unanswered, be sure your IT Services Management Software offers these key parameters:

» **Integration with monitoring services.**

Leading IT Services Management programs integrate directly with popular remote monitoring and managed services applications including N-able, GFI MAX, Level Platforms, Kaseya and many others. These integrations, and the ability to automatically convert alerts into working service tickets, can significantly increase your response time, lower overall cost and increase client satisfaction.

» **Integration with Microsoft Outlook.**

Sometimes you will need to quickly create service tickets from e-mail notifications. Make sure that your IT Services Management System allows you to create service tickets from within your Outlook email using the subject and ticket body to pre-populate ticket information.

» **Dispatching field service technicians.**

The system should allow the dispatch manager to review a list of tickets, make an assignment and automatically notify the appropriate support person through any web or e-mail enabled device, at their desk or on the road. Integration with automated workflow rules and escalation can further increase productivity.

» **Monitoring alert status from initiation through resolution.**

Whether this function includes completing the ticket or just adding notes to the customer's account, the software should keep a complete audit trail for the issue.



USING YOUR MONITORING SOFTWARE AND IT SERVICES MANAGEMENT SOFTWARE TOGETHER CREATES TREMENDOUS BENEFITS, INCLUDING:

» **Eliminating unnecessary time and labor**

by automatically converting monitoring alerts into service tickets.

» **Productively managing and dispatching**

assignments to fix problems identified by the monitoring software and tracking trends to identify areas where you can reduce maintenance costs.

» **Analyzing profitability**

of your managed services contracts, tracking margins by customer and identifying customers who are actually costing you money each month.



**BUSINESS PROCESS #3
IMPLEMENTING AUTOMATED WORKFLOW, ESCALATION AND SERVICE LEVEL AGREEMENTS**

To maintain the highest level of customer satisfaction, you need to exceed customer expectations for service and support. That’s difficult to achieve if you don’t have the internal systems in place to make it happen.

You need to make sure your IT Services Management system has an advanced set of automated escalation and workflow tools to help you establish, track and manage service and support standards.

Whether based on contractual obligations, service level agreements (SLAs) or internal best practices, you’ll need a way to measure key performance indicators and manage the service and support that you commit to provide.

But, if you are like most SPs, all customers — and all incidents — are NOT created equal. It’s important to establish systems that will automatically take the correct action based on a specific incident’s issue type and priority to make sure you maintain compliance with your commitments.

TO MAXIMIZE EFFICIENCY, RESPONSIVENESS AND COMPLIANCE, YOU SHOULD IMPLEMENT A SYSTEM THAT HAS THE ABILITY TO:

- » **Create workflow and escalation rules for service tickets** that are easily defined and customized. These workflow rules should also indicate when and how a service ticket is to be escalated and what actions should be performed. Make sure that you can copy existing workflow rules to use as guides when building new ones.
- » **Define automatic actions,** such as notifications, escalation in priority, change in status and reassignments to be initiated when service standards and time-based commitments are at risk.
- » **Provide an audit trail on the ticket** that displays the events, conditions, notes and actions taken.
- » **Use notification templates,** including system variables, to create unique messages for each workflow rule. To simplify workflow, make sure that your IT Services Management system can open a ticket detail window in the ticketing system right from a link in the notification email. If your techs need to get these notifications in the field, make sure that your system can send notifications to applications like Outlook and to mobile devices and e-mail enabled phones.



» **Comply with required functionality from vendors.**

For example, if you are a Cisco Partner, you want to make sure that your system allows you to define priority levels that comply with the Cisco Prioritization and Escalation Guidelines.

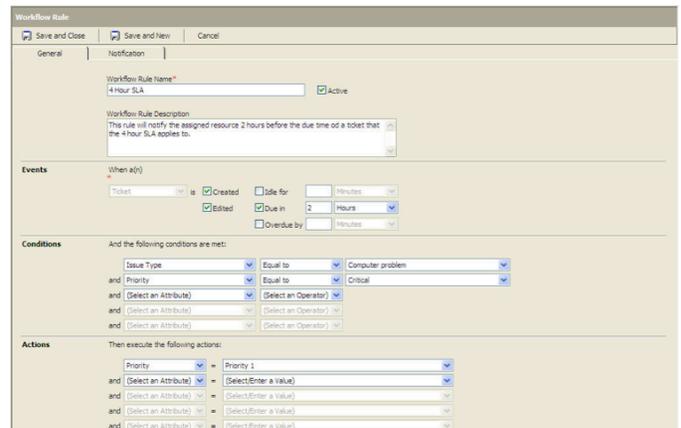
HERE ARE THREE REAL-WORLD EXAMPLES OF AUTOMATED WORKFLOW AND ESCALATION RULES:

Example Escalation Rule 1:

‘Automatically route all new service requests from Acme Corporation that are entered through our client access portal to Joe Technician, and move them to the Dispatch queue so Joe can be assigned an on-site visit to fix the problem.’

Example Escalation Rule 2:

‘When an alert comes in from the Monitoring system that indicates that a web server has gone down, automatically create a ticket, assign it to the lead tech on the account with a critical priority and send a notification to both his mobile device and email account. If the alert is still open and idle after 10 minutes, automatically notify the customer service manager that the critical priority ticket requires immediate action.’



Escalation Rule 3:

‘Send all overdue tickets from Jeopardy or Premier accounts to a queue called “Immediate Attention”, change ticket status to critical and automatically send a special notification to the service manager.’

ONCE INSTALLED, THESE AUTOMATED WORKFLOW AND ESCALATION RULES WILL:

- » **Ensure reliable communication,** improve response times and drive best practices.
- » **Increase utilization** by reducing the time to constantly monitor queues, or triage and review service ticket lists.



- » **Give you the ability to meet and exceed SLAs,**
by heading off problems before they create service issues or financial penalties.
- » **Keep everything on track**
so customers receive the service level that matches their agreement and your internal best practices.
- » **Improve your selling process**
by demonstrating your commitment to delivering the highest level of service and support.

BUSINESS PROCESS #4

PROCESSING CUSTOMER SERVICE REQUESTS

As its name suggests, IT Services Management Software helps you deliver better service, improve response times and provide a complete audit trail no matter how requests arrive – via phone, fax, e-mail or a web portal. And, it allows you to track time and task information against specific contract terms, and keep things from falling through the cracks. Most importantly, it provides important customer metrics to help you analyze both efficiency and profitability.

IT SERVICES MANAGEMENT SOFTWARE GIVES YOU THE TOOLS TO:

- » **Manage Outsourced IT Services**
You can rely on IT Services Management software to handle support, troubleshooting, help desk, warranty work and scheduled maintenance. And, you can dispatch technicians for field service break-fix, installation configuration and upgrades, all from a single dashboard. Look for the ability to create and manage multiple service queues, customize issues and sub-issues, priority, status, routing, ticket history, integrated time tracking and automated notification. If you're doing project work, you should also be able to turn a service ticket into a project task, as needed.
- » **Track Billable Service Work.**
The strength of IT Services Management software is its ability to track and bill services by a variety of activity codes that tie back to the contract terms. This will allow your technicians to focus on the task at hand while the system tracks the billing information in the background. This is also useful when you are using contractors and want to keep your billing information private.
- » **Capture Service Alerts Automatically.**
The IT Services Management software should automatically capture and convert alerts from your IT monitoring packages into service tickets. This feature will keep you on top of 24x7 managed services and help deliver speedy resolution for monitoring, virus, security and other system alerts.

» **Deploy Your Own Branded Client Access Portal.**

Better IT Services Management packages will allow your customers to create, submit and check on the status of their own service tickets through a web-based, client access portal. When submitted, these tickets can trigger a series of customized follow-on questions based on issue and sub-issue type. This feature provides automated, level-1 ticket triage and can significantly reduce response and resolution times.

» **Network Your Partners, Vendors and Subcontractors.**

Next-generation systems will also include universal ticket sharing capabilities that handle the complete spectrum of outsourcing activities from the front end of the process – establishing fees, tracking charges and managing workflow – through client billing and subcontractor payment.

» **Monitor Everything With Service Dashboards & Reporting.**

Another important feature to look for are built-in dashboards that allow you to monitor key metrics such as ticket submissions, tickets due and completed at a glance, and provide comprehensive reporting and performance charts.

THE RIGHT IT SERVICES MANAGEMENT SOFTWARE WILL DELIVER MEASURABLE RESULTS WHEN HANDLING SERVICE REQUESTS, INCLUDING:

- » Reducing call backs and increasing first-call resolution
- » Providing better accountability and response time
- » Preventing customer issues from falling through the cracks
- » Expanding business intelligence by tracking trends and key performance metrics
- » Increasing revenue from billable tickets
- » Improving efficiency by resolving more issues with fewer resources

BUSINESS PROCESS #5

IMPLEMENTING IT CONSULTING ENGAGEMENTS

When it comes to the often-difficult task of managing complex consulting engagements, IT Services Management Software can handle multi-faceted projects smoothly and efficiently.

HERE ARE SOME EXAMPLES OF THE KINDS OF ACTIVITIES YOU CAN EXPECT TO STREAMLINE:

- » Installation and configuration for software, hardware, POS systems and integration projects
- » IT project management such as migrations and office moves
- » Training projects for various IT technology, software and tools
- » Custom software application or web design and development
- » Proactive maintenance plans - including a list of actions that must be performed on supported devices on a regular basis such as reviewing event logs, applying patches and software updates



The best IT Services Management Software will have project functionality that lets you set up templates that can be duplicated for recurring projects or processes. If you are using Microsoft Project or Excel for project planning, then make sure that your IT Services Management software can import project information from these applications. As with stand-alone project management software, be sure you can break projects or processes down into phases and individual tasks, assign team members and contractors to do them, and enter estimated time and deadlines for each. A project dashboard and work records should be updated in real-time as work is done. Automated notification should keep everyone in the loop so that, no matter where they are, they know what to do and when it has to be done. At any time you like, you should be able to rapidly check real-time status to see how your “actuals” compare with estimates.

THE KEY IMPROVEMENTS YOU CAN EXPECT BY IMPLEMENTING AN INTEGRATED PROJECT MANAGEMENT TOOL ARE:

» Better Managed Project Portfolio.

IT Services Management software will connect your business teams to your project teams and result in better visibility, control and analysis across your entire project portfolio. A project manager dashboard will provide one-click access to key reports, project financials and schedules. Cross-project reporting and project portfolio management tools will roll-up summary information and provide comprehensive planning and performance analytics.

» Better Organized Projects.

With one integrated database, your projects will be seamlessly connected to your accounts. Once you close a sale, there should be an easy way to kick off a new project engagement. As the project is built, important details will be tracked every step of the way including the project team, schedule, notes, task assignments, billing information, material and equipment costs, file attachments, project issues and your custom, user-defined information.

Advanced features will provide Gantt charts, real-time status reports and a controlled client access portal that allows the customer to interactively participate. Automated notification and workflow rules will keep project team members informed when they need to be. When a project is complete, equipment will be attached to an account with installation dates, serial numbers, warranty expiration and other configuration data so you always know what your customers have and how it was set up.

» Faster, more accurate billing and reporting

Your IT Services Management Software should be specifically designed to track and bill all project and service related costs to allow faster and more accurate invoicing. The ability to apply any billing format to any customer has been shown to reduce billing related administration costs by more than 50% and will produce more accurate invoices. Labor costs will be tracked in the background so you can easily monitor project profitability on fixed-price projects.

» Digital sign-offs along the way, and a thorough approval process when work is completed should be available to make sure everything is billed correctly.

WITH THIS KIND OF POWER AT YOUR FINGERTIPS, YOU SHOULD EXPECT TO:

- » Deliver more projects on-time and on-budget
- » Quickly see what's due, done and overdue
- » Reduce or eliminate cost overruns against budget
- » Create better time estimates and proposals
- » Get instant status reports while eliminating whiteboards and spreadsheets
- » Achieve better accountability and response time
- » Increase resource utilization and billable hours
- » Quickly identify the right person for a job and fit them into the schedule
- » See in seconds what it once took hours to do by hand

BUSINESS PROCESS #6

MONITORING AND BILLING FIELD SERVICE TIME

Keeping track of everything going on in a busy IT services business is a major challenge. You need a system that has the ability to track and capture all billable services on projects, field service work and outsourced help-desk engagements. An IT Services Management Software solution will help you realize more efficient management of these resources with individual and department-level task assignments that show up on personal dashboards.

At the beginning of the day, everyone on the team should be able to review their service and project work along with estimates, due dates and priorities. Technicians should be able to easily capture and record time, status and work detail – when and where the work is completed.

TO MAKE THE MANAGEMENT AND UTILIZATION OF YOUR TECHNICIANS MORE EFFICIENT, MAKE SURE YOUR IT SERVICES MANAGEMENT SOFTWARE INCLUDES:

» Built-in Dashboards and Timesheets.

Time entry and assignments should be completely integrated. Task assignments should show up on a personal dashboard and allow easy entry of time, status and work details. *You should implement an internal set of best practices to standardize the capture of work details to improve consistency and accuracy.*

» Single Point of Entry with Automated Notification.

Time entry on a task or ticket should automatically update your timesheet. And because most IT Services Management software consolidates data capture and provides a single point of entry, it should also update time on the project task or ticket, all related reports, billing detail and workload reports simultaneously. Based on your internal workflow policy, automated e-mail notification will improve communication and keep key individuals and customers in the loop.



WITH MOBILE WEB-BASED ACCESS:

- » Service techs can log-in, access their schedule for the day before they leave the house, and go directly to their first service call. The saves time spent driving first to the office and then to the call.
- » Techs can log-in from the service site, record details of the work that was done, enter their time and close the ticket. Better systems will even allow them to view other open service tickets for that client or at nearby accounts that could be handled during the same field call, maximizing their utilization and reducing resolution times.
- » Contacts, calendar and to-do items can be synced to a tech's PDA through a Microsoft Outlook integration.
- » Escalated service alerts can be automatically sent to cell phones, pagers, PDAs and other mobile devices.
- » Everyone in the company has access to the critical information they need wherever they are, so long as they have web access

To illustrate; imagine the president of your largest client arriving at work early one morning to find your service tech already waiting at the front door, ready to solve a problem your client didn't even know she had yet. What happened? Your IT Services Management Software automatically created a ticket from an alert it received from your remote monitoring tool at 5:26 this morning, and notified your technician of a critical service issue that needed to be addressed. How's that for exceptional customer service?

THE BOTTOM LINE IS THAT THE MOBILITY, DEVICE AND BROWSER INDEPENDENCE AFFORDED BY WEB-BASED IT SERVICES MANAGEMENT SOFTWARE WILL HELP YOUR COMPANY:

- » Respond faster
- » Save travel time and expense
- » Increase customer satisfaction
- » Make more money

BUSINESS PROCESS #8

BILLING & INVOICING CYCLES, WHERE THE RUBBER MEETS THE ROAD

At the end of the day, your business depends on your cash flow and how quickly and accurately you can invoice your clients for the services you provide. Typical SPs provide and bill for services in a variety of different ways. You may bill projects on a time-and-materials basis, monitoring on a fixed monthly fee, and other managed services under a fixed price contract. Your IT Services Management Software should be able to automatically check your time sheets, work entries and expenses, apply the appropriate contract terms and billing methods for each, and generate a single, detailed invoice that accurately reflects the services you provided over that billing cycle. This feature alone can save countless hours each month formerly spent reconciling accounts and generating invoices manually.

» **Integrated Expense Reports.**

Billable expenses and employee expense reports are one of the most difficult and overlooked areas when it comes to improving the bottom line. Often, billable expenses are never charged to the client because there's no easy way to manage the process. With an integrated expense reporting system, billable items can be entered in real-time – even from the field – right on the expense report, and automatically tracked with the client and project through the final approval, reporting and billing process. The expense reporting system should be powerful enough to create detailed reports, track receipts and capture company-paid items. Because all items are tracked along with their corresponding expense policies and approvals, you will no longer double-pay expense items or suffer from inaccurate or incomplete expense reports.

» **Time Off Requests.**

IT Services Management Software should also allow you to track personal and vacation time-off requests within the system itself, including automated routing and approval or rejection. Workload reports should be automatically updated to better manage resource availability, eliminate coverage gaps and simplify dispatching.

BUSINESS PROCESS #7

GOING MOBILE TO OPTIMIZE TECH TIME

If your business is like most SPs, the most important thing you have to sell – and the thing you sell the most of – is the time and expertise of your service techs. Their time is golden. It generates income, it keeps customers happy and it fulfills contractual obligations. Anything that interferes with that is bad; anything that helps boost your service tech utilization rate is good. The key is flexibility and mobility of access.

That's why the IT Services Management Software solution you select needs to be web-based, so that anyone within your company – but most especially your service techs – can access and update vital information from wherever they are, using virtually any mobile device that connects to the Internet.





TO ACCOMPLISH THIS, YOUR IT SERVICES MANAGEMENT SOFTWARE SOLUTION NEEDS TO HAVE A FULL SPECTRUM OF FUNCTIONS TO MAKE THE TASK OF BILLING EASY, FAST AND ACCURATE, INCLUDING:

» **Flexible Contract & Billing Automation.**

You probably have myriad billing methods, rules and rates that vary across your customer base. Make sure that your IT Services Management Software can be configured to reflect the way you currently bill your customers for both project and service work. It should also be able to handle time-and-materials billing based on multiple roles and rates per customer contract.

» **Fixed Price Work With Milestones.**

It is also important to track the costs associated with the time worked and automatically calculate profitability.

» **Retainer and Prepaid Block Work.**

Be sure it can automatically deduct time worked from the block and provide rules for expiration, and generate notifications when the block is low and override rates when the block runs out.

» **Approval & Posting Workflow.**

It is important to put into place a best practice for approving customer work. In smaller companies the software should be able to automatically approve work when the timesheet is signed-off as final. For more control, especially in larger companies, it should support a checks-and-balances system where a project manager, account manager or service manager can review work entries using pre-bill reports, verify the work performed and easily make adjustments to labor, costs, milestones and expenses.

» **Project & Service Ticket Billing.**

IT Services Management Software is not a replacement for a solid accounting system, but it should be able to provide comprehensive billing details and draft invoices. If you plan to create invoices from within the system, be sure it has the ability to select and roll-up the items you want to display on the invoice including work details, costs, expenses and taxes. Remember, only some invoice items are taxable and the rules often vary by geography so your system should have the power to be configured for these items.

» **Accounting Integration.**

To provide seamless transfer of customer billing data to your accounting team or bookkeeper your IT Services Management Software should provide direct integration with popular accounting packages like QuickBooks. Such integrations remove the need for manual updating and eliminate potential errors in the transfer process. Top systems will allow you to easily match your accounts, product names, allocation codes, expense categories and other data to their equivalent fields in your accounting system, greatly simplifying your billing and reconciliation processes each month.

PULLING IT ALL TOGETHER OVER THE WEB

Because Solution Providers typically have internal resources or contractors in the field, either at the client site or in remote offices, the most flexible service management software is offered as a hosted solution, accessible via the web, on-demand. These solutions are sold on a subscription basis and users are charged a monthly fee. Typically, you pay only for what you use, plus a modest one-time installation and training fee.

Web-based solutions can be easily configured to match your unique workflow and business rules of your company without costly software modifications. As a result you can usually be up and running in a matter of days.

Two important advantages of web-based solutions are accessibility and scalability. Web-based hosted solutions offer you tremendous flexibility as the product can be accessed at anytime from any location through a standard web browser. Secondly, there are no user minimums, allowing the solution to be phased in, one department at a time, until fully implemented. As your company grows, new users can be added as needed providing a very scalable solution.

THEREFORE, THE BENEFITS OF AN ON-DEMAND, WEB-BASED SOLUTION ARE:

» **Accessibility.**

Your techs have access to account and contact information, service tickets, notes, to-dos, calendar items, projects and time entry from any computer or mobile device with Internet access, wherever and whenever they need it.

» **Scalability.**

Like other software solutions delivered in the cloud, web-based IT Services Management Software typically follows a utility pricing model, so you can add users easily as your business grows.

» **Increased Productivity.**

Across your entire organization, not just for your technicians. The best IT Services Management Software will streamline workflow and eliminate redundant work for virtually everyone in your organization right out of the gate.

» **Low Upfront Cost**

Without the need to purchase hardware, a pay-as-you-go pricing model and the elimination of expensive customizations means ROI starts immediately.

» **No Software to Purchase**

With a web-based service there is no software to buy or install and you are always assured of using the most current version of the software because updates are deployed and available automatically to all users as they are released.



» Fast Implementation

The time required to set-up and train staff on the product is measured in days, not months, with minimal disruption to ongoing operations, and business and workflow rules can be configured easily, without the need for costly customization.

» WHAT SOFTWARE SHOULD YOU CONSIDER

IT Services Management software is a “mission-critical” application that will touch and improve virtually every aspect of your business. For that reason you should consider only a top-rated and mature software product that has withstood the test of time, and:

- » Has the full range of features you need today
- » Will evolve to meet your needs in the future
- » Is easily configured to match your business processes
- » Integrates with your existing development tools and business applications
- » Is fully accessible by technicians and employees in the office and in the field
- » Allows you to add employees incrementally
- » Networks you to your clients, partners, vendors and subcontractors

Autotask Corporation is the leading SaaS provider of hosted IT service management tools providing a single, integrated application to manage your entire business, organize people and processes, automate your workflow and integrate your partners and services.

Autotask software has all of the capabilities noted in this white paper and is among the most economical and cost-effective solutions available on the market today. User licenses are approximately \$1 per day, per user.

More than 50,000 technology solutions professionals around the world rely on Autotask to streamline their operations, grow their business and maximize their profits.

For more information about Autotask software, please visit www.autotask.com or call +1 518 720 3500 Ext. 1



Corporate Headquarters

East Greenbush, USA
T + 1 518 720 3500
www.autotask.com

International Headquarters

London, England
T +44 20 3006 3147

Germany

Frankfurt am Main,
Germany
T +49 162 2703 601

Asia

Beijing, China
T +86 010 8278 4881

Australia

Sydney, Australia
T +61 2 8103 4001



IT BUSINESS PROCESS REALITY CHECK

Are you a candidate for IT Services Management Software?		
1. DATA: Is there a single information source to run your business?		
Have you eliminated duplicate entry and re-key of information between systems?	<input type="checkbox"/>	<input type="checkbox"/>
Is all of your customer information in a central location so you do not have duplicate customer information sitting in multiple databases?	<input type="checkbox"/>	<input type="checkbox"/>
2. BUSINESS PROCESS: Do you have the processes in place to efficiently manage your managed services?		
Do you have the infrastructure to track & control standard project work, service tickets and field service calls?	<input type="checkbox"/>	<input type="checkbox"/>
Are your SP applications integrated with your internal workflow and service desk, project, time-tracking and billing systems?	<input type="checkbox"/>	<input type="checkbox"/>
Can you optimize your dispatching and scheduling assignments to prevent wasted travel time, and maximize utilization of your techs?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a system to automatically escalate unattended tickets and notify the right resources at the right time to meet your SLA for each customer?	<input type="checkbox"/>	<input type="checkbox"/>
Can you capture the documentation necessary to justify the value you provide – every time a bill goes out?	<input type="checkbox"/>	<input type="checkbox"/>
3. BUSINESS INTELLIGENCE: Do you have the right information at your fingertips to run your business?		
Can you quickly produce a summary of all the outsourced IT services, consulting services, and managed services you have provided to any customer or group of customers in the last week, month, or quarter?	<input type="checkbox"/>	<input type="checkbox"/>
Can you get an update or status on projects going on “today”, in real time?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have the tools you need to analyze the performance of your business so that you make adjustments to improve efficiency?	<input type="checkbox"/>	<input type="checkbox"/>
Can you easily monitor deadlines and are you certain that no critical customer items are falling through the cracks?	<input type="checkbox"/>	<input type="checkbox"/>
4. RESOURCE MANAGEMENT: Do your team members and techs know their assignments and priority?		
Are you maximizing your resource and tech utilization and maximizing their billable time?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know what’s due, what’s done, what’s overdue, what’s at risk and who’s available?	<input type="checkbox"/>	<input type="checkbox"/>
5. BILLING AND INVOICING: Do you have your arms around all aspects of your company’s billing data?		
Can you accurately track and analyze profitability on fixed price, managed services contracts with minimal effort?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a complete audit trail if a customer asks for detail or questions a bill?	<input type="checkbox"/>	<input type="checkbox"/>
Can you rapidly generate integrated service bills with complete billing details for each customer?	<input type="checkbox"/>	<input type="checkbox"/>
Are you sure you are billing everything, including service time, project time, and customer expenses?	<input type="checkbox"/>	<input type="checkbox"/>

Answering “no” to any of the questions above will point out areas where you are leaving company profitability on the table. And if you answered “no” to three or more questions, your company is a candidate for a business process overhaul that will have a dramatic impact on your bottom line... maybe even the difference between overall success and failure of your company.

And a big part of that overhaul is a simple matter of using an affordable IT Services Management software platform to run your services business better, and to position yourself to thrive in the changing outsourced IT services market.

