Set Your IT Business Up For Success:

Achieving Client Satisfaction in the First 30 Days

LabTech®

You won the new client. What's next?

You won the contract, so clearly your new client believes in your ability as an IT service provider. The time to demonstrate the value you promised during the sales process and start building a solid level of trust starts now, beginning with onboarding and continuing into the next 30 to 90 days.

A poorly designed or ill-executed onboarding process will quickly erode client confidence and satisfaction, as well as increase service delivery difficulty and cost. No matter how you slice it, this is not the way to begin a new client relationship. However, a successful onboarding process does not begin after you've won the client – it starts beforehand. Read that again. Now consider this: It is impossible to successfully onboard a client if you have not collected the data required to set up and configure the client's account in the systems you will use to support them. And the data collection process must begin long before contracts are signed.

In this eBook, we'll outline the data collection process and provide all the steps necessary – from pre-sales through service go-live – to achieve client trust and satisfaction during the first 30 to 90 days of service delivery.

1 Pre-Sales Analysis and Assessment

The Business Needs Analysis

Early in the client relationship and during the pre-sales process, the IT service provider should conduct a business needs analysis with the prospect. This is the time to gather the initial background information and determine whether you can meet the prospect's support needs, as well as whether continuing to explore a business relationship with them makes sense.

It is at this point that high-level information should be collected regarding the prospect's infrastructure, including hardware, operating systems, application software, services and vendors. It is also important to understand the prospect's business processes and workflows, as well as their growth plans, business goals, bottlenecks and pain points. This information, along with office and branch locations, key staff roles and contact information, is gathered in preparation for the technology assessment, which will occur once the decision to move forward is made.

The Technology Assessment

During the technology assessment, more granular data is gathered regarding the prospect's infrastructure in order to document and evaluate the hardware, operating systems, application software and services utilized in the environment, as well as their operating state and the role that each plays in supporting the prospect's business processes.

The technology assessment can be conducted rather quickly if you leverage your IT service tools and technology, such as your remote monitoring and management (RMM) platform, to automate as much of the discovery and data-gathering process as possible and evaluate the resulting output to qualify the infrastructure's suitability for services.

Infrastructure Modifications, Updates and Upgrades

After the results of the technology assessment have been collected, compare the data against your established minimum requirements to determine if any modifications, updates or upgrades are needed for the environment to qualify for services.

2

The Provisioning Process

After the decision is made to move forward with service and a contract is in place, it is time to begin the provisioning process. The client provisioning process is typically characterized as those processes and procedures required to prepare the client, their end-users and their infrastructure to receive and participate in your help desk and service desk services. A checklist of the steps you should following during the provisioning process can be found on the following pages.

The Provisioning Process:

❏ Set up the client's account in your RMM and professional services automation (PSA) solutions, and communication and billing solutions, including all required supported user information

❏ If your RMM tool is agent-based, configure and deploy agents as required to monitor managed devices, operating systems, software applications and services per manufacturer or vendor recommendations and enable secure remote access, control and communications to and from the end-user or client location and your help desk or service desk

❏ If applicable, initialize a discovery routine by the RMM tool to identify all network-connected devices and their roles in the environment, or use other means to capture this information and document it in the RMM and PSA solutions

❏ In the RMM tool, associate the applicable default monitoring templates to all managed devices, operating systems, software applications and services

❏ Develop base monitoring templates and assign them to all devices, operating systems, software applications and services that the RMM tool did not identify or does not have a default template for

❏ Configure, test and confirm the client's ability to generate properly formatted service requests with all required information via email and the PSA solution's service desk portal

❏ Test and confirm proper two-way communication and alerting to and from managed devices, operating systems, software applications and services at the client location and your help desk or service desk

❏ Configure, test and confirm proper operation of the RMM tool's remote access and control function for managed devices and operating systems

❏ Configure, test and confirm proper two-way integration with the RMM tool, with raised alerts resulting in properly formatted service request generation, including end-user, device and client identification information, as well as correct status updating and alert cancellation occurring in the RMM tool upon service request resolution in the PSA solution

❏ Configure, test and confirm proper scripting and deployment of unattended operating system and supported software application patches and updates by the RMM tool

❏ Configure, test and confirm proper scripting and execution of unattended device and operating system optimization activities, such as deletion of temporary files and disk defragmentation by the RMM tool

❏ Customize and test client reports in the PSA solution

❏ Configure, test and confirm proper report generation and automated report delivery by the PSA solution

❏ Collect all infrastructure information (see checklist on the following page) and ensure it is saved in the PSA solution so the help desk and service desk have access to all of the information necessary to deliver services to the client in one managed location

Infrastructure Information to Collect:

❑ Client contact information

❑ Server information (type, make/model, role, warranty, support, OS, version, configuration)

❑ Server application information (type, role, warranty, support, version, configuration, licensing)

❑ Server services configuration information (IIS, DNS, DHCP, file and print, line of business)

❑ Internal Active Directory information (AD Domain, administrator account, users and computers)

❑ Network shares, security and distribution groups

❑ Line of business application information (type, role, warranty, support, version, configuration, licensing)

❑ LAN and WAN information (devices, configuration, addressing, protocols, security)

❑ External Domain Registration information (provider, account, domain name, registrar, DNS, expiration)

❑ ISP information (provider, account, configuration, expiration)

❑ Web and email hosting information (provider, account, configuration, expiration)

❑ Router, switch and firewall information (type, make/model, configuration, addressing, support, warranty)

❑ Anti-virus, anti-spam and anti-spyware information (type, vendor, role, warranty, support, version, configuration, licensing)

❑ Backup, disaster recovery and business continuity information (configuration, processes)

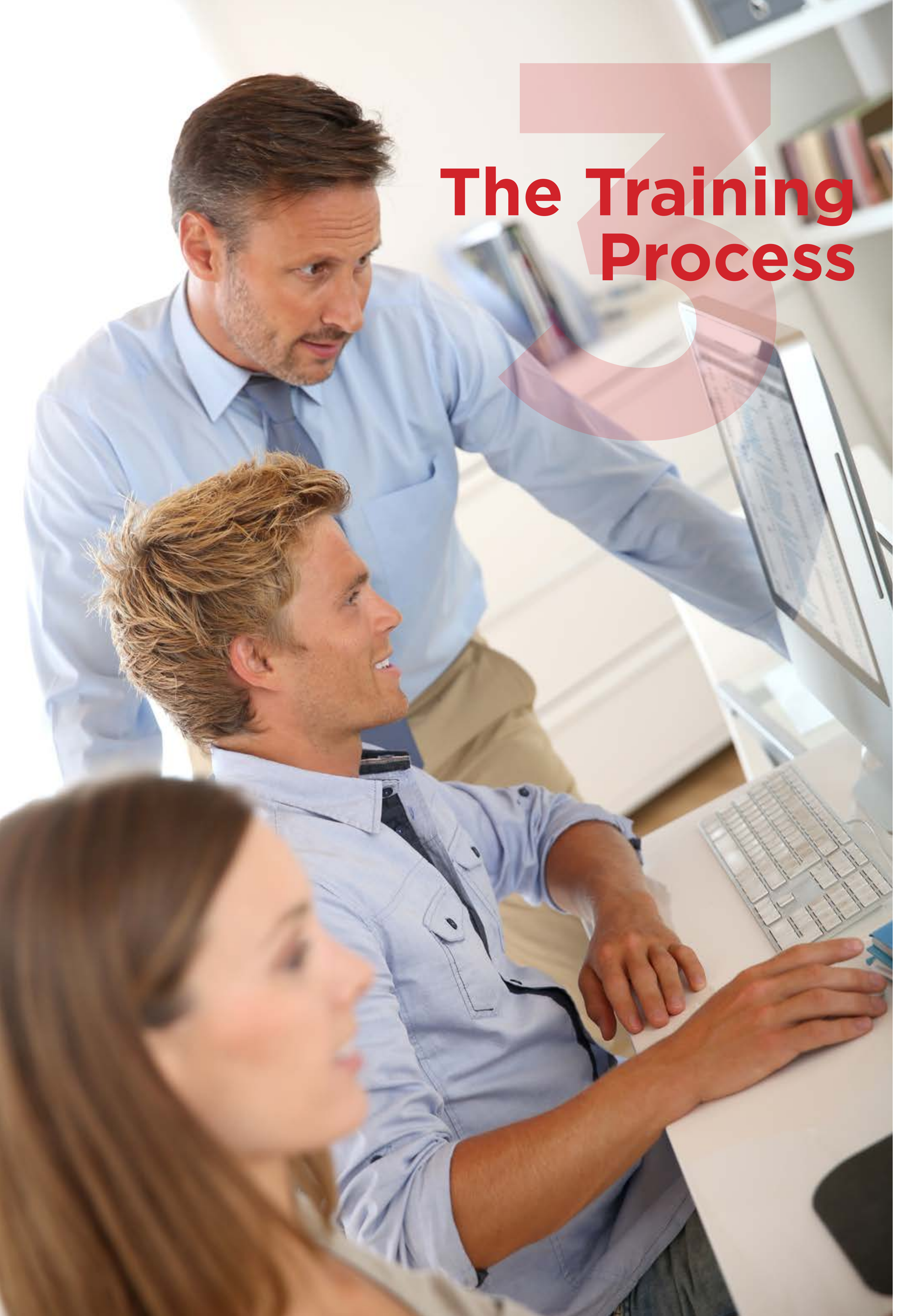
❑ Workstation, laptop, smartphone and tablet information (type, role, warranty, support, version, configuration)

❑ Application and productivity software information (type, role, warranty, support, version, configuration)

❑ Printer, POS and peripheral information (network scanners, faxes, document imaging solutions, credit card terminals)

❑ Other network-attached device information (type, product, service, role, account, warranty, support)

❑ Vendor information (type, product, service, role, account, warranty, support)



The Training Process

Prior to service turn-up or go-live, your help desk and service desk staff, as well as the new client and their end-users, need to be trained. Training should focus on key areas of service delivery for the service desk and help desk personnel and expectation setting for the client. If expectations are clearly set with all parties, the overall transition and service delivery will be very smooth.

Help Desk and Service Desk Client Support Training

Prior to service turn-up or go-live, the help desk and service desk teams must become familiar with the new client's infrastructure and its specific support requirements, along with any required modifications to established support processes for the new client, such as communication, escalation or status reporting processes.

Client and End-User Support Training

Prior to service turn-up or go-live, training sessions should be conducted with the new client to indoctrinate their employees on your help desk and service desk processes and procedures, as well as to set the appropriate expectations in regards to response time and incident management. Topics that may be covered during new client training may include:

- How to open a service request
- Service desk processes
- Service desk response and incident management-specific processes
- Support tiers
- Service level agreement (SLA)
- Customer service
- Reporting

SLAs

If you have a 24 hour SLA, is that 24 clock hours or three business days? If this is not documented and explained to your clients, you are leaving it to their interpretation. If you have to pull out your contract, you quickly lose points with the client.

Communication

Do you use your RMM platform to communicate new issues back to your service desk? Some IT service providers utilize this method of communication in return for priority service, because it proves to be more efficient than telephone calls or emails to your service desk. The client will need to know how this works, as well as if this method of communication receives any priority when it comes to service delivery.

Maintenance Windows

Another key area that must be communicated to new clients surrounds maintenance windows. Maintenance windows are designed to provide clients with a timeframe of when maintenance tasks will be performed so they can prepare for possible disruptions in advance. Typically, maintenance windows will be planned for a time when activity is at its lowest to minimize disruption. Clients must be made aware of the planned schedule, as well as understand the potential impact to their business from rebooting machines during these windows.

Expectations

Have you ever worked with a client who held unreasonably high expectations of you and your business? High expectations that were never addressed and are not outlined in the contract? It's a common problem that has a very simple solution. Before the sale, set clear expectations to establish a strong and sustainable relationship with your client. When setting expectations, timing is everything. If you wait until after the sale is made, the client may feel as though you weren't being honest from the beginning.

4 Service Go-Live

After your help desk and service desk personnel have completed their client-specific training and the client has received their support training, a service turn-up or go-live date can be established. This is the date that all systems, processes, services, help desk and service desk staff, and the client, their infrastructure and the end-users will be designated as ready to participate in help desk and service desk maintenance and support services.

The first thirty days after go-live are the most critical, as this is the time when the end-users will be the most finicky and need to be won over by the new support relationship and its service delivery processes. If there are too many hiccups during this sensitive period, it may be difficult to recover the relationship. This is why it is imperative that the entire onboarding process run smoothly, all processes be tested and validated, all required information collected and documented in the PSA solution and all training by your staff and the client completed prior to the decision to go live with support services.

Additional Tips for Success

If the reason you were hired is that the printer in the corner is consistently offline, it is important that you address the issue in the first 30 days with a plan of attack. If the plan doesn't work, they will at least know that you attempted to address the issue at hand. If unsuccessful, you may have to simply replace the printer, but you must fix the issue that got the last provider fired. Dealing with concerns that have been voiced will set you up to succeed in almost every instance.

Communication is of critical importance during the early stages of the client relationship. You'll need to get to know the client's business as well as possible and understand the products and services they offer, their corporate culture and what makes them unique to their customers.

5 Exceed Established Client Expectations

When it comes to pleasing clients, there is no substitute for high-quality work and a cooperative attitude. After all, that's what you're being paid for. But everyone knows there is more to the story. As an IT service provider, you have to distinguish yourself from other contractors in ways that go beyond the essentials. Here are a few tips that will help you surpass clients' expectations and keep you ahead of the competition.

Agree to a Deadline You Know You Can Beat: Clients nearly always appreciate when good work arrives before the due date. Of course, you shouldn't nudge clients to begrudgingly accept deadlines that do not suit their needs just so you can exceed expectations later. But the surprise of early delivery is more memorable than an up-front offer to beat a client's proposed due date.

Be an Astute Questioner, Not a Silent Sage: People often overestimate the value clients place on not being bothered while their work is with a contractor. In fact, asking pointed, proactive questions during the process demonstrates your genuine interest and focus. Silence, in contrast, can generate unease.

Be Collegial: You're probably thinking, "Duh, I'm obviously not going to be rude." But collegiality is less about politeness and more about your level of deference. Too much deference, which is what most IT service providers show, makes you seem merely like the hired help rather than a capable complement to the internal staff — and that doesn't inspire confidence. Most clients would rather work with an equal than a lackey, especially if you're providing expertise. That being said, acting like a know-it-all obviously isn't collegial either.

Offer Constructive Suggestions at the End: Every process can be improved and who better to provide insights than someone who just went through it? If you focus solely on the merits and not on how you would benefit, your ideas for improvement won't sound presumptuous or like complaints. A truly useful suggestion offered in good faith and with great tact is one that the client will want to implement, probably with you.

Documentation: Document the additional things you have done in the client's environment that were not on their radar or things they didn't even notice were an issue. You should also document items that you are addressing or remediating with auto-fixes to show that you are being proactive by pushing out your standardization into their environment.

6 Report Improvements

The last critical step in this initial client incubation period is reporting back to the client with the improvements that have been made. The key areas to focus on when it comes to reporting back to the client are as follows:

- **IT Investment Planning:** Help clients make better business decisions and plan for future IT investments.
- **Differentiate Your Offering:** Tell your story clearly and concisely to strengthen your value proposition.
- **Maintain and Increase Service Levels:** Use reports to demonstrate how mission-critical business services are performing.
- **Leverage Reports as a Sales Tool:** Drive higher-value business by showing clients ways you can reduce their downtime costs.
- **Become a Trusted Advisor:** Earn your clients' confidence by effectively managing their IT and measuring results against SLAs.

When reporting, it is also essential to ensure that the data being reported is consistent. In other words, don't report one set of data in a pre-sales campaign and then at the 30 or 45-day mark present a different report. This only serves to confuse the picture. Thus, all reports being utilized for client reporting should be presented in a clear and concise manner to ensure the client doesn't become confused by what data is being reported on.

Summary

The key to achieving client satisfaction and building long-term client relationships is starting off on the right foot. It is important that the groundwork be laid in advance to ensure a smooth onboarding process, as this is the time when new clients are most critical of the work being performed. When you are able to make the transition as smooth as possible, you begin to build client confidence. However, it doesn't stop there. By addressing your new client's most pressing needs first and exceeding the expectations that are set, client confidence continues to increase, which enables you to evolve from simply being the hired help to being viewed as a trusted advisor and valuable asset to their business.

About LabTech Software

LabTech is the only managed services platform for remote monitoring and management with automation developed by a managed service provider (MSP) for MSPs. The affordable, agent-based platform so closely emulates what technicians do in the field that the techs can provide the same support remotely. Because LabTech Software understands how to manage a growing MSP business, they make it easier to procure their software and allow partners to add agents as they grow. For more information, please visit labtechsoftware.com or call 877.522.8323.

LabTech®
4110 George Road, Suite 200 | Tampa, Florida 33634
877.522.8323 | labtechsoftware.com

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