WHITEPAPER

HOW TO OBJECTIVELY EVALUATE POTENTIAL RMM AUTOMATION SOLUTIONS

94 "must ask" questions for choosing a complete RMM Automation solution that meets the specific needs of your Managed Services business…

How do you objectively evaluate potential RMM Automation solutions?

This paper will provide a summary of the key requirements for a complete RMM Automation solution and propose specific questions to ensure it will meet the needs of your Managed Services business…

94 "MUST ASK" QUESTIONS FOR CHOOSING A COMPLETE RMM & AUTOMATION SOLUTION FOR YOUR MANAGED SERVICES BUSINESS

Choosing a complete RMM (remote monitoring and management) Automation solution that will meet your immediate and future needs is one of the most important decisions you can make as a Managed Service Provider.

The goal is to use RMM technology to deliver efficiencies, automate as many services as possible, and demonstrate ongoing value to your clients.

While RMM technology is critically important to realizing this goal, it doesn't define a **complete RMM solution for delivering profitable Managed Services**. Not if your business needs also include…

- The ability to generate new sources of **recurring revenue**
- Demonstrating immediate **breakthrough value** to new and existing customers
- Achieving **100% market coverage** by selling to all types of SMBs
- Delivering all services in the most **cost optimized** way possible
- Having total confidence that your RMM vendor will continuously **evolve their product** to further meet your needs
- And other needs

Given its importance to your business success, taking the time to carefully evaluate potential RMM solutions is a prudent business decision. Where do you start? What defines a complete RMM solution? How do you sort the wheat from the chaff?

That's the purpose of this white paper. Specifically this paper will…

- Define key components – what to look for – in a **complete RMM Automation solution**.
- Provide a comprehensive list of **94 specific questions** that you can use to objectively assess different features of any RMM Automation solution.

Questions are grouped in **five key categories** to help you quickly drilldown on features or requirements that are of most importance to you. The overriding purpose of this paper:

- To help you evaluate and confidently choose a complete RMM Automation solution that will meet the specific needs of your Managed Services business.

The insights presented in this paper are based on N-able's work with over 2,500 global MSPs and the key questions they have asked over 12 years. The analysis and questions presented in this paper will be invaluable if you are re-valuating your current RMM software and vendor support needs – or you are an IT provider who wants to transition into Managed Services.

DEFINING A TOTAL RMM SOLUTION

Managed services is not a technology

RMM technology and Managed Services are sometimes thought of as one and the same. The distinction between the two is an important one for choosing a complete RMM solution that will meet your immediate and future needs.

By itself, Managed Services is not a technology: it is a business model for generating recurring revenue from a profitable mix of IT services. Services can range from break-fix and reactive through to proactive, fixed-fee and utility computing.

Efficiencies are realized by delivering services remotely in an automated fashion using **RMM technology**. Standard RMM features include remote automation, remote control, remote monitoring, remote management, and reporting.

Viewed in this light, a **complete RMM solution** must include more than state-of-the-art technology. A complete solution must provide the technology and business services you need to **quickly leverage RMM technology** and take a well-defined and p**rofitable set of managed services to market**.

More than anything, a total solution must consider the post-sale, ongoing vendor support that you can realistically expect. Will you have access to product management to address your needs? How will this solution evolve to better meet your needs? While more qualitative in nature, this aspect of your evaluation is critical if you are going to invest in a complete, long-term RMM solution that meets your business needs today and in the future.

What to look for – a complete RMM solution

To meet both your technology and business needs a complete, end-to-end RMM solution should include these five components:

1. An interoperable **RMM Automation platform**
2. **Best practices** for using the RMM technology and automating IT tasks
3. **Flexible licensing and a-la-carte products** to meet the needs of all SMB customer types
4. **Business transformation services** to ensure you are offering the right mix of managed services and use best practice sales and marketing programs for rapid customer acquisition
5. **Ongoing (post integration) support** to quickly resolve issues or problems and a commitment to evolve the RMM solution to meet your future business needs

This paper will provide a brief analysis of each component – and why it is important to your Managed Services business – followed by specific questions for objectively assessing the technology, features, or support provided.

1 - RMM AUTOMATION PLATFORM: THE TECHNOLOGY FOUNDATION

An RMM Automation platform enables you to meet the IT needs of your SMB clients in a time and cost optimized way. The technology side of a complete RMM solution for achieving this includes the following:

- **Advanced monitoring** of any IP-enabled device
- The ability to **easily and quickly automate** many routine IT tasks and processes **Remotely managing and controlling** any Windows or non-Windows device
- **Performance reports** that give actionable insight to the IT infra-structure
- **Enterprise-class end-point security** protection
- **Fully integrated** with PSA solutions – for accurate tracking and billing – patching, Antivirus, and back-up

The specific features that you will need, and the key questions to ask, depends largely on the mix of Managed Services you want to offer and the IT needs of your target SMB clients.

Advanced monitoring

Monitoring can be viewed as a continuum of activity with IT Professionals monitoring none, some, most or all network activity – **often in distributed, multi divisional or multi department environments**.

The importance of Monitoring IT systems and devices may seem self-evident. You can't manage what you can't monitor. You can't report if you don't monitor. You can't demonstrate that service level agreements (SLAs) are being met if don't monitor. And it becomes difficult to introduce standardized repeatable IT processes or automate the right IT tasks.

What should you look for in a monitoring solution?

At the top of your list should be a **single centralized management console** that gives you a single pane of glass with point-and-click functionality for all monitoring, management, and reporting. This is the **number one feature** that you will want in a complete RMM Automation solution – and a critical requirement for delivering managed services with optimal service efficiency to your SMB customers and achieving maximum technician productivity.

Key features include a fully integrated, centralized console that enables you to:

- Customize views to see different clients and tools – so you can monitor exactly what you need and want
- Schedule all tasks – including remote back-up
- Perform a number of different functions including:
    - » Auto discovery of jobs and devices with a specified IP range
    - » Control and manage endpoint security, anti-spam and anti-virus efficiently with end-to-end remote monitoring, management and reporting
    - » All configuration, updates, monitoring and reporting for security – and all other applications and devices
- See and report on all activities including proactive and reactive tickets created through NOC activities

Centralized monitoring capability contrasts sharply with the day-to-day operational reality of many IT Professionals where technicians rely on monitoring that is provided by various disparate tools. In so doing, they depend on a patchwork approach to Managed Services and never get the "big" network picture that is critical for identifying key repeatable processes – and ultimately, automating the right IT tasks based on best practices.

You'll also want a monitoring solution that can **issue alerts based on thresholds you define**. This will give you impressive insight to potential problems on client networks and work to proactively correct them before they lead to costly downtime for users.

In addition, the most effective monitoring and management solutions use a combination of both agents (used primarily on mobile devices such as laptops and Blackberries) and probes to provide a full view of the entire business network in the most flexible and efficient way.

20 critical monitoring questions to ask…

1. How broad is the OS and protocol support provided? (For example, will it support Linux, Novell, MAC, and Microsoft?)
2. Can you determine that something is about to fail at your customer's location(s)?
3. Can you cost effectively see/watch all of the devices at your customer's location(s)?
4. Can you see all the devices at all of your customer locations in a single listing?
5. Can you see the status of all the services on all of the devices at all of your customer locations in a single listing?
6. Can you see seven different status levels (Failed, Warning, Normal, Misconfigured, Stale, No Data, and Disconnected) of all the services on all of the devices at all of your customer locations in a single listing?
7. Can you filter on:
   a. The seven different status levels to display only what you want/need to see?
   b. Customer name, acknowledged/unacknowledged status, license type, services type, and/or any collected device Asset information including hardware, operating system, network, software details, and more?
8. Can you be alerted on-screen, via email, via SMS that an issue or event has occurred at one of your customer locations?
9. Can you set or customize the thresholds for events that will trigger alerts? (example: disk space > 85% utilized)
10. Can your RMM monitor the warranty expiry dates of devices?
11. Can you customize the visual imagery associated with all aspects of the monitoring system?
12. Can you group common devices and display their statuses at a glance?
13. Can you rapidly determine the details of a status on a device? (hover over icons)
14. Can you automatically start monitoring new devices added to the network?

15. Can you define monitoring templates and apply them to all of your customers?
16. Can you have different types of monitoring automatically added as a device evolves? (example: a server gets Microsoft Exchange installed)
17. Can you see Virtual Host and Virtual Guest information with you RMM?
18. Can you see SNMP information in your RMM?
19. Can you display printer information with your RMM?
20. Can you build custom monitoring services in your RMM?

Remote automation

IT automation is the key to delivering managed services cost effectively and optimizing an SMB's network environment.

The key is to automate the right type of routine tasks to realize new efficiencies, achieve a systematic approach, and improve technician productivity. For example:

- Updating patches, resetting passwords, running defrags, application deployments, performing asset management and updating software on employees' systems, endpoint security, and regulatory compliance – with auditable logs – the ability to rapidly auto-discover all network and systems across the infrastructure and many other tasks.

The more you can automate, the less time you spend reinventing the wheel, the more efficient you become, the fewer scripts you will need to write, and the more consistent your service delivery standards will be. Other key benefits from remote automation include:

- Reducing or eliminating truck roles to client sites
- Reducing operational and/or maintenance costs while adding more services
- Speeding-up response times to clients
- Managing more devices without adding technicians
- Freeing-up time and IT resources to proactively plan
- Maintaining consistent, higher-quality services and SLAs
- Increasing end user (employee) satisfaction
- Allocating your IT resources and work more efficiently

By automating more manual processes, IT automation is also a strategy for eliminating or reducing the number of "nuisance" calls and lessening the cost of dealing with those calls that you do receive.

11 automation questions to ask…

1. What tasks can be automated?
2. How many different tools will be required to automate different processes?
3. How easy will it be to learn and use the tool(s)?
4. Can automation be managed and implemented in a centralized way?
5. Will automation tools quantify and report on where IT resources were invested and with what results?
6. How much money will automation really save?
7. Can you leverage over 350 pre-built and tested automation objects to accelerate your efforts?

8. Can you immediately begin using best-practice management automation policies?
9. Can you create automation policies using a drag & drop interface?
10. Can you clone automation policies and tune them to your specific needs?
11. Does your solution integrate with leading PSA solutions?

Remote management and control

Management and control means the ability to securely connect to and gain control over any Windows or non-Windows device on any client network in seconds.

Depending on your clients, devices could be located on a distributed network anywhere in the world. A key success factor is an intuitive, easy-to-use Web-based centralized management console that gives your technicians the ability to:

- Troubleshoot and then instantly fix issues remotely
- Remotely patch desktops and servers
- Gain one-click access for remote control and remote desktop and server management
- Automatically distribute software and scripts to remote PCs and servers
- Conduct asset and license management for PCs and other devices

Managed services for mobile – the fastest growing market

Today, remote management and control must extend your Managed Service relationship to mobile devices including smart phones, tablet computers, and personal digital assistants (PDAs). Essentially any device that is now part of the network or work environment and considered an "enterprise asset" must be a device that you can manage. This is likely to be one of the fastest growing and most important opportunities for your Managed Services business.

What to look for?

A desirable management and control solution that is part of a complete RMM Automation solution needs to have a track record and the proven functionality for enabling you (or your IT technicians) to:

- Remotely manage Windows and non-Windows systems as well as network devices with lightning-fast remote control
- Distribute software, apply patches, execute scripts and transfer files
- Auto-discover network infrastructure, devices and vital systems information in minutes
- Remotely provide end-point security with anti-virus and anti-spam protection to any device
- Measurably increase your staff utilization rates by giving each of your IT technicians the power to easily manage 500+ end-users
- Reduce or eliminate time-consuming on site visits to deal with end-user or desktop issues
- Lower your operational costs by providing a pre-packaged, seamlessly integrated remote management and control solution that doesn't rely on open external ports or VPNs
- Extend your Managed Services relationship to mobile devices – adding a new and important new revenue opportunity

13 questions to assess remote management and control features…

1. Can you launch self-healing management activities based on monitored events?
2. Can you launch ad-hoc management activities as needed?
3. Can you schedule regular management activities?
4. Can you schedule .BAT, .VBS, .PS scripts?
5. Can you create management activities with drag & drop design tools?
6. Can you automate patch management approvals?
7. Can you create Patch profiles to scale your patch management efforts across thousands of devices?
8. Can you push third party software?
9. Can you manage scripts centrally to avoid the security and maintenance associated with distribution?
10. Can you provide remote assistance to your managed clients?
11. Can you provide remote assistance to your break-fix clients without installing software ahead of time?
12. Can you perform remote troubleshooting (registry editing, command prompt, etc.) behind the scenes without interrupting the user?
13. Can you customize and deploy a system tray icon to all devices under management?

PLUS 6 "must ask" Mobility questions…

1. Can your technicians gain access and respond to device and alert information while on the road?
2. Can you manage and enforce the security and restrictions of your customers' mobile devices?
3. Can your mobile solution provide Apple iOS and Android support?
4. Will you provide device asset details?
5. Can you provide lock/wipe data loss prevention?
6. Can you provide geo-tracking, BYOD and corporate support?

Performance reporting

Professional, standardized reports have emerged as a key success factor for any MSP or IT service provider. One reason that reports are so important is that the vast majority of your proactive interventions and reactive, Help Desk activities are delivered remotely. You are off-site and out-of-mind. That means your Managed Services can go unnoticed, un-reported, and potentially undervalued by some clients.

This is why easy to produce, customizable, professional looking reports are critically important. Reports enable you to quickly communicate the value of your IT services. For example:

- *"The following back-ups were completed…"*
- *"Here are the patches we applied this month…"*
- *"These tickets were closed…"*
- *"Here is the status of your servers…"*
- *"This breakdown of current disk usage reveals…"*
- *"Our technicians completed the following tasks…"*
- *ETC.*

This type of information can be summed up quickly and simply in one of several standardized stock reports. The net result to your customer is that they see exactly what IT services you are providing on an ongoing, month-to-month basis.

All information should be presented in easy-to-read, scorecard style executive summaries and branded with your look and feel (logo, colours, etc.).

Reports are also invaluable for jumpstarting the right kind of conversations with your SMB clients on a range of IT issues. These include IT infrastructure upgrade, and performance issues. When you are talking with your client, you are providing crucial IT insights that will help their business, build the relationship, and become a Trusted Advisor.

Look for a fully integrated reporting solution

A fully integrated reporting solution means a **single pane of glass** – enabling technicians to generate any report from one, **centralized management console**. Using an integrated reporting tool is the key to big time savings and efficiencies.

While there are many excellent standalone reporting tools – they come with their own console. That means your technicians have to "toggle" between screens. The time involved to do that quickly adds up in a mid to large size Managed Services business.

Operating within two consoles also adds the risk that the data does not correlate between the two systems. A fully integrated reporting tool eliminates this risk while streamlining and simplifying all monitoring and management activities.

Ensure you get a holistic view of all reactive and proactive activities

You'll want a reporting solution that tracks all tickets produced in the course of providing your Managed Services. This is central to your ability to track time and bill accurately. That means knowing both reactive and proactive tickets issued within a client environment.

To achieve this critical goal the reporting solution will need to integrate with leading third party PSA ticketing solutions such as **ConnectWise** and **Autotask**. It's one thing to know what tickets your technicians created in the course of providing proactive service to clients. What is required is a holistic view that summarizes all tickets produced: both reactive and proactive tickets issued within a client environment.

7 key questions to assess a fully integrated reporting capability…

1. Can you deliver tactical and business level reporting to your customers?
2. Can you create parameter driven reports?
3. Can you customize reports using a drag and drop interface?
4. Can you create your own reports?
5. Can you create aggregated reports that include RMM and PSA data?
6. Can you leverage your reporting solution as a data archive for trend reporting?
7. Can you run reports without worrying about the impact on your monitoring server?

Managed Endpoint Security

Although anti-virus is considered essential by most SMBs, it is also seen by many to be a commodity. One reason is the sheer number of anti-virus and security choices available. Also many anti-virus and "real-time" security products are offered at low cost or "free" by many major vendors as part of other bundled security services or applications.

The challenge is to find an approach to delivering anti-virus and managed endpoint security in a way that enables you to profitably service your customers within a Managed Services model.

What to look for?

You'll want an RMM Automation platform that is fully integrated, giving you the ability to monitor and centrally manage a standardized end-point security solution (across all SMB customers). Managed means continuously monitoring: if the anti-virus software is not working or updating, you need to receive a notice so the problem can be acted upon. In other words, it is an "active" managed process – even though it may be automated by an RMM system.

This is the promise and compelling benefit of Managed Endpoint Security. Centralized management through a single RMM Automation console is the critical requirement. With this approach, security becomes an integral part of you integrated, high-value Managed Services offering rather than the "add-on" of a traditional, price-sensitive commodity tool.

In addition, a true managed endpoint security solution will give you the ability to ensure all SMB customers get world-class anti-virus protection. This includes:

- **Anti-spam**
- **Firewall**
- **Anti-virus/spyware**
- **Intrusion prevention**
- **Centrally managed quarantine**
- **Content filtering**
- **Real-time alerts**

10 questions to assess Managed Endpoint Security…

1. Can you configure, deploy, monitor, manage and report on Anti-virus software from a central console?
2. Can you configure and control the ports used with your RMM solution?
3. Can you leverage Active Directory for the user authentication to your RMM?
4. Can Active Directory be utilized from within your datacenter and/or at each customer location?
5. Can you leverage two factor authentication (2FA) with your RMM solution?
6. Can 2FA be utilized from within your datacenter and/or at each customer location?
7. Can your RMM pass compliance audits?
8. Can you perform network scans and deliver vulnerability reports to your customers?
9. Can you perform network scans and deliver configuration reports to your customers?
10. Can you perform network scans and deliver compliance reports to your customers?

2 - BEST PRACTICE APPROACH TO AUTOMATING IT TASKS

Automation using pre-written scripts and self-healing capabilities are proven ways to reduce costs and improve service delivery and efficiency. The overriding question is: what are the scripts and automation policies provided by an RMM solution based on?

A complete RMM Automation solution will provide scripts and self-healing features that are based on proven, best IT practices, policies, and processes. These should be available as a library – or compiled in a Technician Runbook – with hundreds of pre-written, ready-to-use automation objects that define specific IT tasks that span all facets of your business and service delivery including:

• Policy Management
• Systems Management
• Local Account Management
• Network Management
• File and Folder Management
• Registry Management
• Event Log Management
• Performance and Health Management
• DNS Management
• Hardware Management
• Exchange Server Management
• Active Director

All objects need to be pre-tested, re-usable and based on documented best IT practices. Automation objects need to be powered by an automation engine with a simple, drag and drop functionality. This is the where the rubber hits the road and it is the real key to achieving breakthroughs in operational efficiency. One reason is that by using pre-scripted objects from an automation library you'll save a lot of time having to write scripts. They've already been written. You simply point and click and the automation engine does the work.

Together, a Technician Runbook – populated with Automation Objects based on best industry IT practices – and a drag-and-drop Automation Engine provide a powerful one-two combination for next-generation automation capabilities and efficient, standards-based service delivery.

**7 specific questions to ask about a best practice Runbook…**

1.   Does your RMM include documented best practices for IT service delivery
2.   Can you successfully run your business if your lead technician leaves?
3.   Can you rapidly train new technicians to follow your best practices?
4.   Can you ensure that all technicians are delivering services to the same level?
5.   Can you link your monitoring and management activities to documented practices?
6.   Can you rapidly search your IT Service delivery book for specific tasks?
7.   Can your IT Services and documentation stay current with the latest products and releases?

3 - FLEXIBLE LICENSING MODEL + A-LA-CARTE PRODUCTS

The importance of a flexible licensing model can be illustrated by the Gartner IT Maturity Model shown in figure 1 below. The Maturity Model segments SMB customers into five markets based on how they value and buy IT services:

- **Break-fix** – 100% of a technician's time is dedicated to reacting to failures discovered by the customer
- **Responsive** – similar to a break-fix customer with 100% of a technicians time reacting to failures discovered by the customer and/or an RMM tool
- **Proactive** – preventative maintenance is added to service delivery to minimize the threat of IT failures
- **Managed** – fixed fee contracts provided to SMBs who understand the relationship between the effectiveness of their IT systems and bottom line
- **Utility** – the MSP is an integral part of the SMB business and in many cases a vCTO
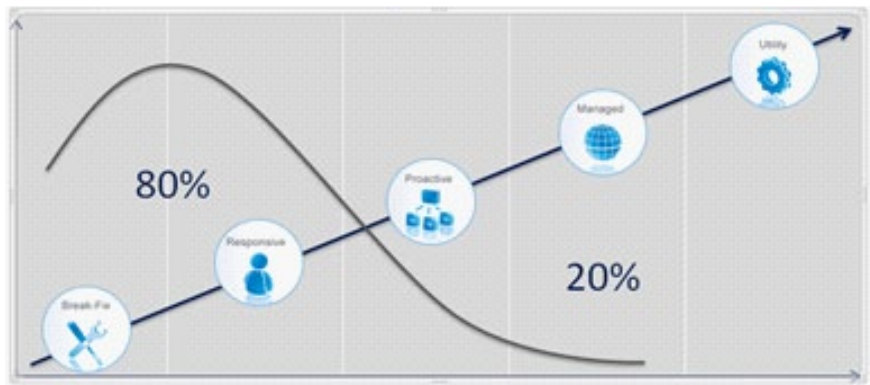
Figure 1: the SMB market is not characterized by an equal weighting of customers at each level of the adoption cycle. 80% of the addressable market falls into the Break-fix and Responsive level. These customers want a simpler, easier to understand solution that provides immediate value in response to a specific IT need.

According to this model, 80% of today's SMB marketplace is dominated by **Break-fix** and **Responsive** customers. These SMBs only want to buy individual products and services such as Antivirus, Anti-spam, and Back-up and other IT services when they need them. Conversely, 20% of the addressable SMB market is interested in fixed-contract type Managed Services.

For SMB customers that have agreed to a recurring services contract, the licensing arrangement for delivering technology enabled Managed Services is straightforward. You provide professional agents that are fully paid for by your customer in return for proactive, fully Managed Services for the devices covered.

What do you do for the majority of the SMB market – the 80% that sees IT as-a-cost and who do not want fixed-fee contracts?

What you need

To sell to all customer types and achieve 100% market coverage you need a complete RMM solution that gives you **flexible licensing options** – and an **a-la-carte product offering**.

Flexible license

A flexible licensing model enables you to use RMM technology to provide a Managed Service to SMB customers *when they want it*. The model is all about giving you the choices youy need to use paid, professional agents for those customers who are paying for recurring services – and a lighter weight version of their technology that can be offered at a lower cost – or for free – to *demonstrate immediate value* to customers who aren't willing to pay for a fully managed service today.

Reduces the risk to you and the SMB

A flexible licensing model recognizes the demanding marketplace reality that you are selling in today. It introduces an approach whereby everyone shares in the risk – and rewards. The model removes the onus on you to purchase *all of the RMM technology* required to deliver managed services up front. Instead, you get a "lighter" or less costly (or free) option that gives you the flexibility to deploy depending on the characteristics of your market and opportunities.

Once a customer sees the value, you can easily "flip" the switch from one license site to another so that it doesn't create any hiccups or delays in services to your end customer. It is a "win-win" situation and a proven strategy for getting a critical foot in the door.

A-la-carte product offering

With an a la carte approach, you have the flexibility to sell a single solution that is delivered as a Managed Service. This could be an individual solution for Antivirus, Anti-Spam or Back-up. These are products that all SMBs need now and many want to buy as a single point solution.

With an a-la-carte approach, you have the flexibility to address a break-fix client's need today with a product that is still sold as a Managed Service. The advantage is that you are getting them on your dashboard and demonstrating fast value. This enables you to sell Managed Services to SMB customers at all types of IT Maturity. You are achieving 100% market coverage.

6 questions to assess a flexible licensing model…

1. Does your RMM offer a hybrid license model?
2. Can you deliver light-weight monitoring for free to desktops and laptops while delivering granular monitoring and management to critical devices with your RMM?
3. Can you migrate a device from light monitoring to become a fully managed device with a simple "checkbox"?
4. Can you expand your offering via a-la-carte software (Backup, Security) additions?
5. Can you purchase your RMM software on subscription terms, perpetual terms or lease terms?
6. Can you purchase your RMM software as a SaaS offering or for an on-premises deployment?

4 - BUSINESS TRANSFORMATION SERVICES

Having the right RMM technology backed by a flexible licensing model and an a-la carte product offering is critical if you want to achieve 100% market coverage. Another key consideration when choosing a complete RMM solution is whether you are looking for just a technology company or a Managed Services company. This is a critical question.

Do you just want the nuts and bolts for providing Managed Services? A good technology company can give you that. However a good technology company is unlikely to be able to provide a context for using that technology or understand the specific business issues that you are facing as an MSP when implementing that technology.

A complete RMM solution will give you both: the right technology AND business transformation services for integrating the technology into your business and architecting targeted sales and marketing programs based on best practices. This will help you identify, price, and go to market with a profitable set of managed services in the shortest time possible.

Business transformation services can consist of a mix of **professional development** services and state-of-the-art **online resources** including:

- **A dedicated MSP Partner Development Specialist** – an individual with deep experience in Managed Services who can provide expert one-on-one help assessing opportunities, identifying the best prospects, pricing new managed services, and crafting a competitive go to market strategy.
- **Sales and marketing training** – both personal training and self-guided web-based tutorials to help you acquire critical new selling skills and craft a custom strategy for your managed services business.
- **Digital Binder** – pre-packaged marketing materials that you can use immediately to start generating new recurring revenue. This could include:
    - » Sales scripts, sales presentations, and customizable marketing pieces including collateral, web site templates, case studies, newsletter, presentations, press releases, email teasers and pricing calculators.
- **Knowledge Management Portal** – a searchable online help resource that gives you 24/7 access to best practices, collateral, and courses while connecting you to a broader community of MSPs.

9 questions to assess the level of business transformation support…

1. Do you offer any type of business transformation services?
2. Do you provide one-on-one consultation with a dedicated Partner Development Specialist or someone with in-depth Managed Services experience?
3. Do you provide access to advanced analysis and planning services?
4. What program planning and service definition expertise do you have?
5. Can you help me assess my business, technical and operational capabilities?
6. Will your solution enable me to build effective marketing and sales programs for acquiring new customers and selling managed services? If so, how?
7. Do you provide sales training and coaching assistance?
8. What kind of self-guided and online web tools come with your solution?
9. Do you provide sales and marketing materials based on best practices – including cold call scripts, sales presentations and customizable marketing collateral?

5 - ONGOING POST IMPLEMENTATION SUPPORT SERVICES

Business transformation services define immediate post sale and some of the ongoing support services you may need in a complete RMM solution.

What happens after your RMM technology is integrated into your business model, you are up and running and providing services? What happens when you have a technology or product feature problem? It is not a question of whether you will have problems like these it is a question of when. All software is great until if fails. RMM software is no different.

That's because RMM technology is by definition complex – with lots of "moving parts" to give you real-time control over distributed IT systems. More to the point, the market is constantly evolving and changing – as are your business needs. Those changes will create challenges or define opportunities for new products or identify a need for enhanced features on existing products. Whatever the driver, you will need your RMM solution provider to be responsive. What can you expect after you are up and running?

What you should look for

First and foremost you need to be able to trust your RMM vendor to deliver what they promise. Talk is cheap. Everyone will claim to be responsive to your needs after you have installed their software and have been on-boarded. What does their track record say?

Compare roadmaps with actual product features

If the RMM solution provider has a track record of making announcements about future releases and features that come and go with no substantive changes, the track record does the talking. If only 50% of the promised new features arrive and 5% are good; you have a problem. There is no reliability there.

Fortunately most vendors post information online about their product plans. Look for information on what their product roadmaps were one, two, and three years ago. Do those roadmaps match-up with product announcements and releases? Did the new releases include the features and functionality promised in the initial announcement?

Another critical thing to look at is the relationship you can expect with the product and management team behind the RMM solution. Business transformation services may help you integrate and go-to-market quickly; they won't necessarily help you figure out the best way to do a specific task six or twelve months down the road. Or if the product doesn't do exactly what you want, help you figure out workable options. You need direct access to and open communication with product managers to resolve these types of issues. Will you get it?

User forums are a good indicator

One way to see what you can expect after you have been on-boarded is to check out user forums that exist around the product: is there an active community built around the product? How much transparency is there? Is product management involved and responding to online dialogue? How involved are they?

You can always find a software solution that is cheaper or in some cases, for individual point solutions, free. If there isn't a solid user base behind the product or complete RMM solution then you are not going to get a strong commitment to development. An RMM solution provider only knows what to create when users are giving them feedback and telling them what they need. Do they have a strong user base that is giving them the feedback they need to evolve their product? The last thing you want is to have integrated a new RMM solution – and find out that you are on your own.

5 questions to help assess the post implementation relationship and ongoing support…

1. Will you have direct access to the product management and/or members of the executive team?
2. How many new releases have you announced over the past five years?
3. What features or new products were promised in their last roadmap – and did the actual release deliver?
4. What user groups are built around your product(s)?
5. How active are user groups and is your product management team involved and responsive?

IN CONCLUSION

This paper identifies the key categories that you should carefully examine to ensure you get a complete RMM solution. Within each category, this paper proposes objective questions that you can ask to ensure you get a solution – with the type of support and services you need for your Managed Services business.

The criteria and questions will enable you to make a fair, apples-to-apples comparison of potential RMM solutions and make the best choice possible.

A master checklist of all 94 recommended questions appears in Appendix A. Use this chart to fairly and objectively evaluate potential RMM solutions and vendors to ensure you get what you need to address business challenges and be the most successful MSP that you can.

THE N-ABLE ADVANTAGE

N-able Technologies has a unique, multifaceted strategy to help all MSPs go-to-market with confidence, align their sales strategy and products with the needs of all types of SMB customers, and achieve 100% market coverage. Key planks in the total N-able solution for quickly transforming MSP businesses and giving them an unfair competitive advantage are:

- N-central, the industry's number one rated Remote Monitoring and Management (RMM) Automation platform
- A best practice approach to automation using the industry's first MSP Technician Runbook
- Unique, industry leading Hybrid licensing model and standalone "a-la-carte" product offering for maximum up sell and cross selling opportunities and achieving 100% market coverage
- Comprehensive business transformation services for integrating RMM technology and making you more successful as a MSP or IT service provider
- Extensive and ongoing support for Partners through direct access to product management teams and robust user forums

To learn more about N-able Technologies and the game changing, breakthrough opportunities that it provides, visit **www.n-able.com**.

APPENDIX A: MASTER CHECKLIST

The following chart summarizes all (94) questions by category that should be examined to help you objectively assess potential RMM solutions and ensure you get the features, functionality, services and vendor support you need.

Questions to ask…	RMM vendors being compared		
RMM TECHNOLOGY	#1	#2	#3
Advanced monitoring			
1. How broad is the OS and protocol support provided? (For example, will it support Linux, Novell, MAC, and Microsoft?)			
2. Can you determine that something is about to fail at your customer's location(s)?			
3. Can you cost effectively see/watch all of the devices at your customer's location(s)?			
4. Can you see all the devices at all of your customer locations in a single listing?			
5. Can you see the status of all the services on all of the devices at all of your customer locations in a single listing?			
6. Can you see seven different status levels (Failed, Warning, Normal, Misconfigured, Stale, No Data, Disconnected) of all the services on all of the devices at all of your customer locations in a single listing?			
7. Can you filter on:			
a. The seven different status levels to display only what you want/need to see?			
b. Customer name, acknowledged/unacknowledged status, license type, services type, and/or any collected device Asset information including hardware, operating system, network, software details, and more?			
8. Can you be alerted on-screen, via email, via SMS that an issue or event has occurred at one of your customer locations?			
9. Can you set or customize the thresholds for events that will trigger alerts? (example: disk space > 85% utilized)			
10. Can your RMM monitor the warranty expiry dates of devices?			
11. Can you customize the visual imagery associated with all aspects of the monitoring system?			
12. Can you group common devices and display their statuses at a glance?			
13. Can you rapidly determine the details of a status on a device? (hover over icons)			
14. Can you automatically start monitoring new devices added to the network?			
15. Can you define monitoring templates and apply them to all of your customers?			
16. Can you have different types of monitoring automatically added as a device evolves? (example: a server gets Microsoft Exchange installed)			

17. Can you see Virtual Host and Virtual Guest information with you RMM

18. Can you see SNMP information in your RMM?

19. Can you display printer information with your RMM?

20. Can you build custom monitoring services in your RMM?

Remote automation

21. What tasks can be automated?

22. How many different tools will be required to automate different processes?

23. How easy will it be to learn and use the tool(s)?

24. Can automation be managed and implemented in a centralized way?

25. Will automation tools quantify and report on where IT resources were invested and with what results?

26. How much money will automation really save?

27. Can you leverage over 350 pre-built and tested automation objects to accelerate your efforts?

28. Can you immediately begin using best-practice management automation policies?

29. Can you create automation policies using a drag & drop interface?

30. Can you clone automation policies and tune them to your specific needs?

31. Does your solution integrate with leading PSA solutions?

Remote management and control

32. Can you launch self-healing management activities based on monitored events?

33. Can you launch ad-hoc management activities as needed?

34. Can you schedule regular management activities?

35. Can you schedule .BAT, .VBS, .PS scripts?

36. Can you create management activities with drag & drop design tools?

37. Can you automate patch management approvals?

38. Can you create Patch profiles to scale your patch management efforts across thousands of devices?

39. Can you push third party software?

40. Can you manage scripts centrally to avoid the security and maintenance associated with distribution?

41. Can you provide remote assistance to your managed clients?

42. Can you provide remote assistance to your break-fix clients without installing software ahead of time?

43. Can you perform remote troubleshooting (registry editing, command prompt, etc.) behind the scenes without interrupting the user?

44. Can you customize and deploy a system tray icon to all devices under management?

Mobility

45. Can your technicians gain access and respond to device and alert information while on the road?
46. Can you manage and enforce the security and restrictions of your customers' mobile devices?
47. Can your mobile solution provide Apple iOS and Android support?
48. Will you provide device asset details?
49. Can you provide lock/wipe data loss prevention?
50. Can you provide geo-tracking, BYOD and corporate support?

Performance reporting

51. Can you deliver tactical and business level reporting to your customers?
52. Can you create parameter driven reports?
53. Can you customize reports using a drag and drop interface?
54. Can you create your own reports?
55. Can you create aggregated reports that include RMM and PSA data?
56. Can you leverage your reporting solution as a data archive for trend reporting?
57. Can you run reports without worrying about the impact on your monitoring server?

Managed Endpoint Security

58. Can you configure, deploy, monitor, manage and report on Anti-virus software from a central console?
59. Can you configure and control the ports used with your RMM solution?
60. Can you leverage Active Directory for the user authentication to your RMM?
61. Can Active Directory be utilized from within your datacenter and/or at each customer location?
62. Can you leverage two factor authentication (2FA) with your RMM solution?
63. Can 2FA be utilized from within your data-center and/or at each customer location?
64. Can your RMM pass compliance audits?
65. Can you perform network scans and deliver vulnerability reports to your customers?
66. Can you perform network scans and deliver configuration reports to your customers?
67. Can you perform network scans and deliver compliance reports to your customers?

Best practice approach to automating IT tasks

68. Does your RMM include documented best practices for IT service delivery

69. Can you successfully run your business if your lead technician leaves?

70. Can you rapidly train new technicians to follow your best practices?

71. Can you ensure that all technicians are delivering services to the same level?

72. Can you link your monitoring and management activities to documented practices?

73. Can you rapidly search your IT Service delivery book for specific tasks?

74. Can your IT Services and documentation stay current with the latest products and releases?

Flexible licensing model + a-la-carte products

75. Does your RMM offer a hybrid license model?

76. Can you deliver light-weight monitoring for free to desktops and laptops while delivering granular monitoring and management to critical devices with your RMM?

77. Can you migrate a device from light monitoring to become a fully managed device with a simple "checkbox"?

78. Can you expand your offering via a-la-carte software (Backup, Security) additions?

79. Can you purchase your RMM software on sub-scription terms, perpetual terms or lease terms?

80. Can you purchase your RMM software as a SaaS offering or for an on-premises deployment?

Business Transformation Services

81. Do you offer any type of business transformation services?

82. Do you provide one-on-one consultation with a dedicated Partner Development Specialist or someone with in-depth Managed Services experience?

83. Do you provide access to advanced analysis and planning services?

84. What program planning and service definition expertise do you have?

85. Can you help me assess my business, technical and operational capabilities?

86. Will your solution enable me to build effective marketing and sales programs for acquiring new customers and selling managed services? If so, how?

87. Do you provide sales training and coaching assistance?

88. What kind of self-guided and online web tools come with your solution?

89. Do you provide sales and marketing materials based on best practices – including cold call scripts, sales presentations and customizable marketing collateral?

Ongoing post implementation support services			
90. Will you have direct access to the product management and/or members of the executive team?			
91. How many new releases have you announced over the past five years?			
92. What features or new products were promised in their last roadmap – and did the actual release deliver?			
93. What kind of user groups are built around your product(s)?			
94. How active are user groups and is your product management involved and responsive?			

ABOUT N-ABLE TECHNOLOGIES

N-able Technologies is the global leader in remote monitoring and management automation software for managed service providers and IT departments. N-able's award-winning N-central platform and complementary toolsets, backed by best-in-class business and technical services, are proven to reduce IT support costs, improve network performance and increase productivity through the proactive monitoring, management and optimization of IP-enabled devices and IT infrastructure. N-able is 100% channel-friendly and maintains operations in North America, the U.K., the Netherlands and Australia

COPYRIGHT