THE MSP REPORT ADVANTAGE

How to use standardized reports to demonstrate breakthrough value, retain more customers, and become a trusted advisor to your customers.

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HOW TO SHOW YOUR IT VALUE...
AND BECOME A TRUSTED ADVISOR

The ultimate goal of managed service providers (MSPs) and IT service providers alike is to become **a Trusted Advisor to their SMB clients.** "Trusted Advisor" describes a special relationship that is the Holy Grail for all professional service providers.

As a Trusted Advisor, the MSP becomes the de facto resource and first port of call for a client in need of valued advice and support on any IT issue.

Moreover, as a Trusted Advisor the MSP is in a tremendous position to influence their client's thinking and decision-making on future investments and IT strategies. That means:

- Ongoing, repeat business
- Reduced need to quote on or compete for contracts
- Exposure to increasingly challenging IT problems
- New like-minded business from valuable referrals

A relationship that is founded on trust is also a powerful way for an MSP to **protect critical business relationships** from competitors.

How do you create trust?

Showing continuous value over time is the cornerstone of a trust-based relationship. Yet, for the majority of MSPs and IT service providers, the ability to clearly show the value created by their managed services is hugely challenging.

That's why **professional, standardized reports** have emerged as a key success factor for any MSP or IT service provider. Reports with visual, dashboard style graphics quantify the value delivered to an SMB client. Executives see the value in seconds. Value is the key to building trust.

How to quickly and easily quantify and show the value of your IT services through standardized reports – and become a Trusted Advisor – is the focus of this white paper.

This paper is based on insights gained from SolarWinds N-able's extensive work with some of the most successful, top performing, highest-growth MSPs around the world.

DO CLIENTS SEE THE FULL VALUE OF YOUR MANAGED SERVICES?

This paper will show how demonstrating your value through standardized, customer-facing reports is critical to becoming a Trusted Advisor or evolving into the coveted role of Virtual Chief Information Officer (vCIO) for your clients. Find out:

- Why reporting is so challenging for MSPs
- What you should look for in a state-of-the-art reporting solution
- Reports recommended by N-able Technologies® to position yourself as a trusted advisor

THE BIG CHALLENGE: CLIENT RETENTION

The number one challenge reported by all MSPs and IT service providers is **finding new clients.**

The flip side of the same challenge is client retention.

If you can't retain customers, it will be impossible to become a Trusted Advisor or a vCIO. Lack of client retention also puts you on a constant treadmill to find and acquire new customers.

Ironically, if more customers are retained, it takes immediate pressure off or reduces the urgency of acquiring new customers – unless growth is your explicit goal.

The overriding problem faced by all MSPs and IT service providers when trying to retain customers is the fact that the majority of remediation, preventative maintenance, and NOC services are provided remotely and quietly in the background.

Out-of-sight is out-of-mind

A key problem is visibility. The MSP may be working tirelessly, 24/7 to safeguard their clients' networks and ensure optimal efficiency. Because the vast majority of their proactive interventions and reactive, Help Desk **activities are delivered remotely;** they go unnoticed, un-reported, and often undervalued.

If the SMB doesn't see their MSP working onsite, it's easier for them to dismiss the value created by the IT services that have been delivered remotely. Yes, the network is running smoothly. Does the client always attribute that to the interventions and proactive activities of their MSP? Not always.

As well, not being onsite makes it difficult for the MSP to build a closer, one-to-one relationship that leads to valuable exchanges and eventually to a Trusted Advisor role.

Regular network health checks are critical

To help overcome the challenges created by remote service delivery, SolarWinds N-able advises its Partners to build a standardized checkpoint into their service agreement. This could be as simple as a "50,000 foot" monthly or bi-monthly network health review where the MSP summarizes key activities, insights, and information. 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 predefined reports. The net result to the customer is that they see exactly what IT services are being provided on an ongoing, month-to-month basis.

TIME SAVINGS

The ability to generate standardized, pre-built reports from a single console translates into impressive time savings and efficiency benefits for any MSP.

Many of N-able's Partners report time and budget savings in excess of 50% when using an automated reporting tool.

The ability to provide this type of information in a professional, easy-to-review report is critical for showing value by highlighting potential issues and engaging the client in discussions about future IT needs to better support their business. This kind of value is critical to retaining a customer – and becoming a Trusted Advisor or a vCIO to clients.

Easier said than done

The vast majority of MSPs and IT service providers that are providing this type of information are either producing reports manually – or they are doing it inefficiently from separate consoles. In both instances, it takes time to produce professional looking reports with sufficient detail to clearly show the value created.

The high cost of manual reporting

The total time required to manually pull information into a summary report for all clients varies significantly from MSP to MSP. It depends largely on the size of the MSP's business and specifically, the number of SMB clients served.

In SolarWinds N-able's experience, pulling together report data manually represents an investment of **half-an-hour to three hours per client every month.** This involves collecting the right data, usually from various sources or software suites, and manually compiling it into a presentable, professional document that is formatted for ease-of-reading by the end customer.

It's easy to see how this labour intensive activity quickly translates into a significant investment of time and effort. An MSP providing managed services to 100 to 200 clients is looking at **dedicating over one work week per month** – simply generating reports.

Larger MSPs may spend hundreds of man hours trying to pull critical information together. Much of this information is cobbled together in Word documents or Excel® spreadsheets – both of which are ineffective tools for presenting a complete picture across multiple physical and virtual environments.

The higher cost of not reporting

Not surprisingly, given the level of effort required to produce some type of report, up to **80 percent of IT service** providers don't bother with formal reports or they have little to no reporting capabilities.

These service providers either don't realize the strategic importance of providing regular reports or they haven't been faced with a situation where a client has been put

at risk. Or they are simply deterred by the level of complexity, time and effort involved with preparing a good, high-value customer-facing report.

Instead of preparing lengthy reports, many smaller service providers opt to **periodically deploy technicians on site** with the hope that clients see sufficient activity to justify their monthly IT expense.

Whether a report is produced manually or a technician is deployed on site doesn't matter. Both options are costly, non-scalable, and inefficient strategies for dealing with the issue of quantifying the value of services provided – and in so doing, retaining more customers.

The highest price of all is paid by those MSPs who have yet to incorporate some type of formal reporting into their managed service business and have little to no onsite presence. These MSPs risk high customer churn simply because they are not visible. They are not showing clients the value delivered with sufficient frequency or granularity. They are vulnerable to other MSPs who offer a competitive service offering – coupled with a strategic reporting capability that quantifies the work that has been done.

The bottom line is this: the majority of MSPs and IT service providers that are producing reports acknowledge they need to be doing a better job of showing and quantifying the value of their services. Those that are not producing standardized reports need to urgently add this capability if client retention is a priority.

WHAT KIND OF REPORTS?

Communicating the value of your IT services is one of the biggest drivers for producing professional looking, standardized reports. It's not the only reason.

Top tier MSPs ensure they have key information that highlights important IT infrastructure, upgrade, and performance issues that require a discussion with their customer. When you are talking with your client, you are providing crucial IT insights that will help their business. In so doing, you are building the relationship. You are on the way to becoming a Trusted Advisor.

[1] Gartner Research 2005: IT Management Process Maturity Model

What reports do you need to drive the right kind of conversations? A good RMM reporting tool will provide you with many real-time predefined reports that provide critical insights to the IT landscape of your clients.

For example, **SolarWinds N-able's Report Manager** – a customizable business reporting tool – provides Partners with **45 predefined reports** that automate data extraction. These reports can be used "as is" or easily customized to provide quick insight to the IT infrastructure using intuitive, "glance-and-know" dashboard style graphs.

The **top five reports** recommended by our Partner Development specialists today include

- The Executive Summary Report
- Capacity Planning Report
- AV Status Report
- Ticket Summary Report
- Network Assessment Report

Executive Summary Report

We put the **Executive Summary Report** at the top of the list of "most useful" reports. As the name implies,

it provides a summary of all IT activities that occurred during the month.

What makes this report hugely valuable is the unique use of dashboard style graphics to visually present complex key performance information. As shown in figure 1, executives can glance through the report and "get it" in seconds, often with little or no explanation required.

The Executive Summary report provides an overall score for their client's network followed by a detailed breakdown in key areas of the IT infrastructure:

- **Asset Management**
  - Devices Under Management
  - Server and Network Warranty
  - Workstation, Laptop and Mobile Warranty
- **Security Monitoring**
  - Antivirus
  - Windows® Patching
  - Third Party Patching
  - Hardware Firewall
- **Data Protection**
- **Network Reliability**
- **Performance**
  - Servers
  - Workstation/Laptops
- **Ticket Summary**
  Each area reported on includes an overall percentage scorecard that is benchmarked against the previous reporting period. The MSP has the option to include or exclude information that provides an explanation for
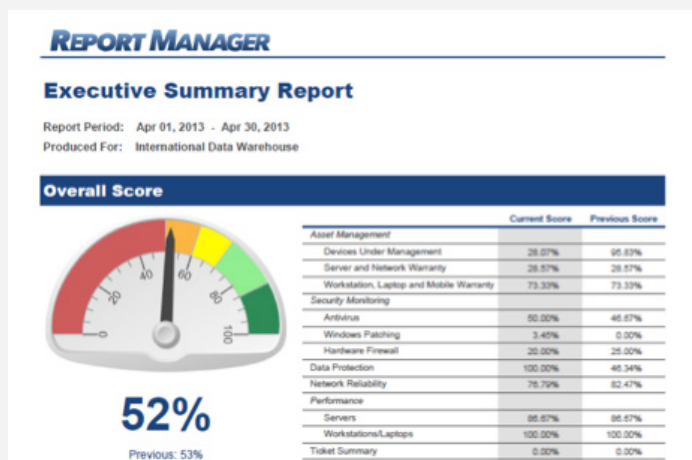

FIGURE 1:

The Executive Summary Report uniquely presents all information in visually pleasing, easy-to-scan dashboard style graphics, charts and tables.

This specific report reveals at-a-glance an overall score of 52% for the reporting period, benchmarked against a previous score of 53%. This information can be used by the MSP to make specific recommendations to avoid potential problems while quickly confirming immediate IT priorities and tasks.

the relative success or failure of every activity and task being measured. MSPs can choose from three presentation levels to ensure details are appropriate for different audiences:

- **Executive Level** – 3 to 4 pages offering a true high level, "executive summary" that is ideal for owners and C-level professions
- **IT Level** – roughly 10 to 15 pages

- Consolidation and virtualization strategies will meet service level needs
- Future purchasing decisions that will ensure maximum productivity
- And many other proactive initiatives

The AV Status report enables the MSP to quickly and easily quantify all AV solutions and their status. It ensures they are aware of exactly what is going on in

FIGURE 2:

The AV Status Report quickly scans the network by client, location, or device to provide a summary of all AV solutions with details on what is current and out of date.

offering a moderately detailed report

- **Exhaustive CIO Level** – providing 40+ pages with full details on all activities

Capacity Planning Report

SolarWinds N-able highly recommends this report because it compares performance metrics to a baseline that is established in a previous month or reporting period.

The report shows precisely how much capacity each client has now, where their clients' servers are tracking in terms of capacity – and when maximum capacity can be anticipated. The Capacity Planning Report is invaluable for highlighting looming issues and driving proactive planning to support a wide range of initiatives including:

- IT and business alignment to ensure the IT infrastructure meets future service needs

their clients' environment by summarizing all AV solutions including the updated vs. outdated status and where AV scanning is enabled vs. disabled. **Figure 2** illustrates the type of information that is provided by the AV Status report. This report is usually used in conjunction with many other reports to provide a well-rounded summary of the current IT environment.

Ticket Summary Report

SolarWinds N-able's research with MSPs and IT service providers around the world revealed a pressing need to **report on all tickets as a whole** – proactive tickets created by the MSP and reactive tickets created through NOC activities including Help Desk calls and email requests.
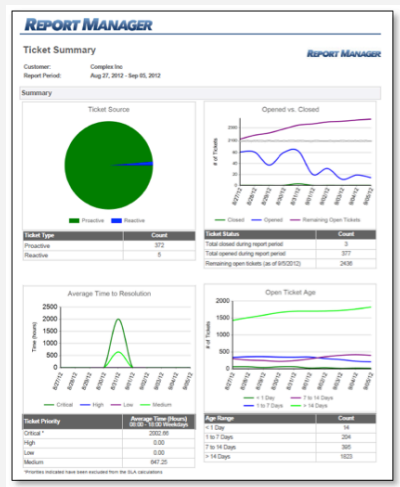
FIGURE 3:

The Ticket Summary Report is a detailed, 2 to 10 page report on average – depending on the number of tickets. MSPs get a holistic view of the network that includes both reactive and proactive tickets in a given month.

To meet this need, SolarWinds N-able created a Ticket Summary report that integrates data from leading PSAs and help desk systems, as illustrated in **Figure 3**. This report gives MSPs a holistic view based on all data collected in the course of providing services and safeguarding client networks.

NETWORK ASSESSMENT REPORT

Whereas the reports mentioned so far in this paper have focused on **demonstrating value to existing clients** – the Network Assessment Report is used predominantly by SolarWinds N-able's Partners **as a pre-sales tool.**

As illustrated in **Figure 4**, this report gives you the ability to quickly do an analysis on a potential client's **existing network environment** – your "technical due diligence" so that you can quickly understand its current condition, identify the actionable items that need to be addressed immediately, and what needs to happen before the client can receive your service.

The report is invaluable for quickly giving you an overview of critical information in various categories – and the insight you need to position your services in relation to a client's immediate IT support needs.

FIGURE 4:

The Network Assessment Report provides a detailed asset inventory that summarizes the current status of the network and all devices with actionable findings/results.

Categories include:

Asset Overview

- Servers
- Workstations
- Network Devices
- Printers
- Warranty Summary
- Installed Software
- License Key Inventory
- Open Ports Overview
- Patch Status
- Anti-Virus Assessment
- Network Shares
- Capacity Planning

Normally this type of assessment would require the deployment of a technician onsite for a day or more to log-in and manually check all the services and map out the network.

With the Network Assessment Report, built right into Report Manager, you simply drop in a probe, run the report and get the information you need to demonstrate immediate value to a potential new SMB client.

WHAT TO LOOK FOR IN A REPORTING SOLUTION

The huge advantage provided by these and many other reports is that they automate tasks that previously took hundreds of man hours to produce. The result is massive savings in IT staff time and budget while demonstrating the value of your managed services. To deliver these efficiencies and showcase your value, look for a reporting tool with these characteristics.

Fully integrated into a Remote Monitoring and Management platform

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 IT 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.

FIGURE 5:

Report Manager from SolarWinds N-able gives you fingertip access to a library of 45 predefined reports including…

- **Alert by Category Report**
- **Alert Summary by Category Report**
- **Application Availability Report**
- **AV Status Report**
- **Availability Comparison Report**
- **Capacity Planning Report**
- **Critical Error Report**
- **Data Protection Report**
- **Device Notes Report**
- **Downtime Cost Impact Report**
- **Executive Summary Report**
- **Firewall Incident Trend Report**
- **Hardware Inventory Report**
- **Hardware Upgrade Planning Report**
- **Health QuickView Report**
- **Incident Summary Report**
- **Last Boot Up Time and Logged In User by Device Report**
- **Managed Devices by Operating System Report**
- **Managed Devices SLA Report**
- **Managed Devices Summary Report**
- **Managed Devices Versus Time Report - Monthly Availability Report**
- **Network Assessment Report**
- **Network Health Overview Report**
- **Network Oversight Report**
- **Notification Summary Report**
- **Patch Overview Report**
- **Patch Status Report**
- **Printer Consumables Report**
- **Remote Control Usage Report**
- **Resource Utilization Report**
- **Security Alert Report**
- **Service Availability Report**
- **Shared Folders Overview**
- **Site Overview Report**
- **Software Inventory Report**
- **Technical Summary Report**
- **Ticket Summary Report**
- **Traffic Usage Report**
- **Utilization Comparison Report**

Includes the reports you need

A large library of predefined reports is critical to give you the **flexibility needed to demonstrate and quantify the specific value you have provided.** The right reports can highlight issues and problems with **laser-like precision.** The more reports you have at your fingertips, the more options you have for pinpointing an issue or problem while creating new value for your clients.

See Figure 6 for an example of the **45-predefined reports** that ship with SolarWinds N-able's Report Manager. The predefined reports contained in the Report Manager library are based on carefully researched use cases.
They represent possible scenarios that address specific reporting needs.

The whole idea behind the Report Manager Library is to **minimize or eliminate the time required for you to produce your own custom reports.** Odds are you will find exactly what you need in N-able's ever expanding Report Manager library.

Provide a holistic view of all reactive and proactive activities

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 reporting solution that summarizes all tickets produced: both *reactive and proactive* tickets issued within a client environment.

Report Manager's Ticket Summary Report:

• Is conveniently generated from a centralized management console to **provide a holistic view of all activities** – reactive (help desk tickets) AND **proactive tickets.**

• **Dynamically pulls analytical information** from all tickets to provide MSPs with a single, easy-to-read standardized report that facilitates analysis and troubleshooting.

Custom report generation

While a good reporting tool will provide a library of standard reports, there will likely be scenarios where you will want to emphasize or include additional information. This means having the ability to tweak or customize the data fields to meet your specific needs. Or you may want to create your own unique reports.

Custom report generation allows you to tell **the story you need to tell.** Flexibility is the name of the game and critical to your ability to quickly zero-in, capture, analyze and report on the metrics you need to **demonstrate breakthrough insights and value.**

For example, you may schedule client meetings on a quarterly basis. How easy is it to configure your reporting tool to provide a network summary report that only delivers data for that period? Or perhaps a given predefined report includes data that is irrelevant to a particular client. How easy will it be to exclude that data? Conversely, how easy would be to simply add another data field because that information would be more relevant and very useful?

While most of our Partners find that predefined reports meet the majority of their needs "as is," many are dealing with a **particular industry vertical.** These MSPs need the flexibility to easily modify one or more reports without reinventing the wheel – or incurring the time and expense of creating custom scripts to extract the data they need.

The power of Report Manager is that it is the only reporting solution that gives you **access to the design environment:** you can easily customize data and create your own, unique visually appealing report templates branded with your look and feel.

NEXT STEPS

While becoming a Trusted Advisor is the ultimate goal, few MSPs or IT service providers begin their relationship with a client in this role. Trust is based on value received and it is earned over time.

The right reporting tool is the key to showing value and gaining trust by enabling you to incisively answer questions like these:

- What specifically have we done for you today?
- What issues have we proactively prevented?
- How have we saved you money?
- What should your top IT hardware and software investments be and why?
- How can IT do a better job of supporting your core business?
- Where is your network at risk?

When you can quickly answer questions like these through professional, standardized reports you will develop a closer relationship and rapport with your SMB clients. You will be able to **communicate your value and explain with relevant metrics** what they can and should be doing to evolve their IT systems to improve business performance.

In summary, Report Manager...

- Ships with **45-ready to use strategic and executive level reports** that quickly show your IT value and easily demonstrate the performance of the IT infrastructure and devices under your management.
- Is an **essential tool for quickly and easily quantifying the value** of managed services and building a Trusted Advisor relationship with your customers.
- Is fully integrated with N-central®, a leading RMM and MSP Service Automation Platform.
- Can quickly and easily produce a standardized report on all proactive and reactive tickets and a wide range of AV solutions – from **a single, integrated RMM & MSP Service Automation Platform.**
- Enables you to quickly **customize pre-built report templates or easily create entirely new reports** to meet your specific needs.

All reports generated by Report Manager can be quickly and easily branded to reflect the identity of your managed services business and the identity of your end-customers.

Part of the N-able Advantage

Report Manager is one component of a unique, multifaceted strategy used by N-able Technologies 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 a competitive advantage are:

- N-central, a leading Remote Monitoring and Management (RMM) Automation platform
- An unique hybrid licensing model with optional a-la-carte modules and FREE Essential licenses
- Comprehensive professional support services to help MSPs go to market with new revenue generating services in the fastest time possible

The technology foundation

N-central provides the critical technology foundation that equips MSPs and IT service providers with remote monitoring and management capabilities for cost effectively automating IT tasks, optimizing a networked environment, and proactively protecting networked IP-enabled devices.

Learn more about the N-able advantage and how you can take full advantage of Report Manager to demonstrate breakthrough value and become a Trusted Advisor by visiting **www.n-able.com.**

ABOUT SOLARWINDS N-ABLE

SolarWinds N-able is the global leading provider of complete IT management, Automation, and MSP business transformation solutions. N-able's award-winning N-central® is the industry's #1 RMM and MSP Service Automation Platform. N-able has a proven track record of helping MSPs standardize and automate the setup and delivery of IT services in order to achieve true scalability. N-central is backed by the most comprehensive business enablement support services available today and the industry's only Freemium licensing model. Thousands of MSPs use N-able solutions to deliver scalable, flexible, profitable managed services to over 100,000 SMBs worldwide. With offices in North America, the Netherlands and Australia, N-able is 100% channel-friendly and maintains strategic partnerships with Microsoft®, Intel®, IBM®, CA®, and Cisco® among others.

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