



# MSP AUTOMATION BREAKTHROUGH

**How to automate more tasks, increase productivity, improve customer satisfaction, and reduce risks (with the same technician headcount)**

# EXECUTIVE SUMMARY

Most MSPs agree that using best practices and proven processes are critically important for delivering scalable, reliable, and repeatable NOC and IT services to small and midsize (SMB) businesses. Yet N-able's research with partners around the world reveals that few MSPs have well documented processes that are used by all technicians to ensure consistent service delivery to all SMB customers.

Instead, the majority of MSPs are dependent on a few senior techs and undocumented processes. This effectively puts the MSP business owner at the mercy of "tribal knowledge" and is a prescription for inconsistent IT practices and service delivery.

As the Managed Service market matures, competition will become progressively more intense. All MSPs will be challenged to find more efficient ways of delivering NOC and IT services to a consistent and reliable standard.

N-able is addressing this critical need today with a breakthrough approach to automation that is revolutionizing the MSP NOC and IT Services delivery market. N-able is now providing an advanced drag-and-drop UI Automation Platform that is based on the industry's first and only standards-based MSP Technician's Runbook – a recipe of best industry practices and processes. This powerful combination now provides MSPs with a game changing automation solution for setting up and delivering Managed IT services in a consistent, scalable, and repeatable fashion to all SMB customers.

## INTRODUCTION

The key to delivering true, profitable managed services is **standardized, repeatable, scalable processes**. This will become even more important as the managed services industry continues to mature and attract major established players.

Michael Porter, one of the leading authorities on competitive strategies, wrote that all industries go through a transition from wild growth and no standards to maturity and eventual decline. Companies must use different strategies to compete effectively at each stage.

Mature markets are characterized by slowing growth, increasing competition from non-traditional competitors, consolidation, and price wars. This is the marketplace reality that "pure play" managed service providers (MSPs) are facing today. In particular, they are seeing aggressive competition from new solution providers who derive part of their revenue from IT services. Microsoft is one example. Office 365 offers enterprises a cloud based productivity tool with "advanced IT" features. Many other competitors are converging on the managed services sector as a way to diversify their revenue including VoIP, print management, audio visual, and copier providers.

To grow and be profitable in this period of frenetic competition, **MSPs must be able to deliver services with greater efficiency**. They must look for innovative ways to improve their relative profitability within an industry that has established a fair market value for largely commodity based IT services.

Achieving new levels of efficiency and productivity are unlikely to come from traditional approaches. Existing tools in the MSP market are based on a non-scalable, non-repeatable, and non-best practice services model. What **MSPs urgently need is a disruptive new approach** to an established strategy: Automation.

The importance of automating routine tasks to achieve superior efficiencies is not a new story or breakthrough idea for MSPs. What is new, and urgently needed by the industry, is greater insight to what should be automated – and how **automation can ensure delivery of standardized, repeatable processes**.

Achieving greater levels of efficiency, productivity, and profitability through a dramatically different approach to automation is the focus of this white paper. Specifically this paper will establish:

- Why traditional approaches to automation are **“old school” and ineffective**
- The **critical importance of best practices** for ensuring scalable, repeatable, consistent processes
- How you can break your businesses dependence on one or two skilled IT technicians.
- How new approaches to automation can **double or triple the number** of customers managed with the same headcount
- Key requirements for **next generation automation solutions** for delivering maximum value

This white paper will be invaluable if you are a MSP business owner or IT service provider and you want concrete strategies for managing more customers and devices with the same number of technicians while delivering scalable services with optimal efficiency in a highly competitive marketplace.

**Existing automation tools in the MSP market are based on a non-scalable, non-repeatable, and non-best practice services model. What MSPs urgently need is a disruptive new approach to an established strategy: automation.**

**The value of automating tasks increases at every stage of IT adoption because SMB customers increasingly understand the relationship between the effectiveness of their IT systems and their bottom line.**

## AUTOMATION OPPORTUNITIES VARY BY CUSTOMER TYPE

A key goal of MSPs is to reduce costs. A proven way to achieve this is to automate as many IT services and repetitive tasks as possible – and increase the number of devices managed per technician. Not surprisingly, MSPs and IT service providers have been quick to adopt various tools to improve their efficiency and deliver services profitability.

The opportunities for an MSP to automate IT services varies significantly with different types of small and midsize (SMB) customers. While all SMBs experience the same type of IT challenges, they are not all willing to embrace proactive, planned services. This is illustrated in figure 1 below using the IT Maturity Model.

The IT Maturity Model, developed by N-able Technologies, is based on Gartner research and N-able’s 12 years of direct experience working with global MSPs. The Model segments SMB customers into distinct customer types based on how they value and buy IT services:

- Break-fix, responsive, proactive, and managed type customers.

SMB customers who operate in the break-fix and responsive stage of the model see IT as a cost. Customers who operate in the proactive, and managed stage see IT as an investment.

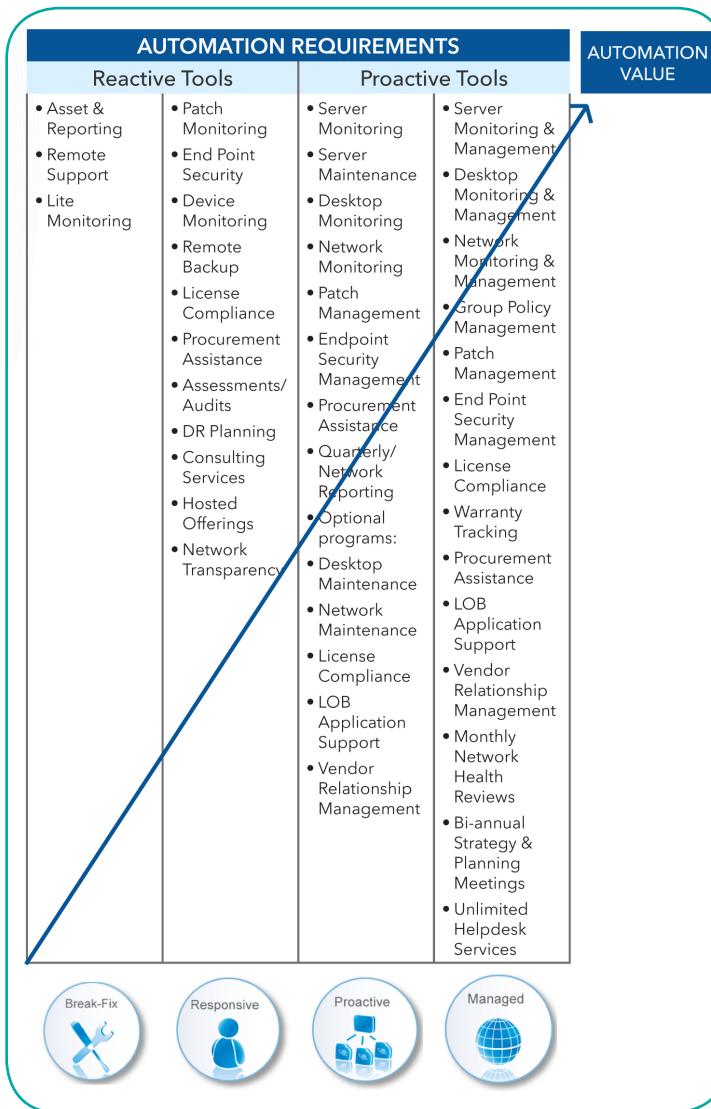
The IT Maturity Model shows how an MSP’s mix of IT services and tasks changes as SMBs move further up the IT value chain. The opportunities to automate more tasks increases at every stage of IT adoption because SMBs increasingly understand the relationship between efficient, proactive IT services and their bottom line. Similarly, MSPs can deliver more services at the same or lower costs – enabling their SMB customers to maximize the return on their IT investment.

## SCOPE OF RESEARCH

Many of the insights and conclusions in this white paper are based on primary research conducted by N-able throughout 2011 and its ongoing work with over 2,500 global MSP partners. In 2011 N-able surveyed its top performing, high growth MSPs with the goal of identifying and documenting best MSP practices – processes that enable all technicians within a given business to consistently perform high performance tasks in the same repeatable, scalable fashion. These best practices have been consolidated in a single authoritative document to create the industry’s first Technician’s Runbook for delivering repeatable managed services. This white paper draws heavily on the research conducted for this comprehensive document.

Put another way, automation is clearly a key success factor in an MSPs ability to attract and service the most desirable types of SMB customers: managed, proactive, and utility customers. These are the types of SMB customers who see their MSP as an integral part of their business and success.

As the managed services market continues to mature and become increasingly competitive, “pure play” MSPs will face increasing pressure to demonstrate new automation value to the coveted, proactive segment of the SMB market.



**FIGURE 1: Automation value increases as SMB customers move from the break-fix stage of IT adoption to managed services. Reactive IT tasks tend to be more labour intensive and less easy to automate. Proactive tasks are scheduled and automation is a key to optimal efficiency.**

## AUTOMATION CHALLENGES

Automation is clearly a key success factor for any MSP who wants to operate an efficient, profitable business. Simply put, a technician that does not use some type of automation tool to deliver IT services will need to rely exclusively on manual tasks and can expect to manage about 125 devices.

Add an advanced Remote Monitoring and Management (RMM) automation tool – like N-able’s N-central – and the same technician can manage 250 to 500 devices – or more depending on their skill level. As a result, MSPs enjoy fewer truck rolls to resolve problems, the quality of services to end users is improved, technician utilization rates increase, and the cost of service delivery is lowered. These are a few of the many positive outcomes for using an automation tool.

As impressive as these benefits are, they do not enable an MSP to achieve the kind of breakthrough value that will be required in a mature, ultra competitive managed services market. MSPs need an automation solution that will enable their technicians to manage in excess of 500 devices each if they are to compete effectively for the most desirable SMB customers and remain profitable. MSPs face significant scripting challenges when trying to scale their business and automate tasks with today’s RMM tools. Scripting challenges include:

- Development and testing,
- On-going maintenance, and
- Reliance on the knowledge of key individuals.

These challenges lead to inefficiencies in current MSP business and IT service delivery models.

## DEVELOPMENT AND TESTING

Developing and testing scripts is a complex undertaking that involves programming expertise that can be expensive, if not challenging to bring in-house for smaller MSPs. Many scripts end up being very customer or site specific – and can’t be easily adapted or applied to multiple customers. As such, many scripting investments do not result in scalable assets that can be easily reused to meet other customers’ IT needs.

## COSTLY MAINTENANCE

Trying to fix, change or update scripts to stay relevant and current with new releases is time consuming and

labor intensive. The on-going investment to maintain scripts often outweighs the benefit that will be realized.

## KNOWLEDGE OF KEY INDIVIDUALS

Many MSPs struggle with the fact that critical automation and process knowledge is centralized in the heads of one or two technicians. Few processes get documented; often they are shared as needed to accomplish a task. As a result, many MSPs place their business at risk by relying on the knowledge of a few key individuals and undocumented processes. When a key individual leaves, remaining resources try to pick up the slack. However, in the short term, service delivery efficiency and quality can be compromised while the MSP scrambles to find a replacement or retrain existing staff.

```
Windows PowerShell Integrated Scripting Environment (ISE)
File Edit View Debug Help
Untitled.ps1 X
PS C:\> get-help
PS C:\> get-wmiobject win32_bios | fl
Status : OK
Name   : Phoenix ROM BIOS PLUS Version 1.10.AB
Caption: Phoenix ROM BIOS PLUS Version 1.10.AB
IsPresent: True
Version: 1
SerialNumber: 1
CLASS  : CIM_BIOS
SUPERCLASS: CIM_ManagedSystemElement
DYNASTY: 
REL_PATH: 
PROPERTY_COUNT: 27
DERIVATION: 
SERVER  : 
NAMESPACE: 
PATH    : 
BIOSCharacteristics: 
ErrorCorners: 
BootOrder: 
Contract: 
CurrentLanguage: en-US
ProcessorCount: 1
Phoenix ROM BIOS PLUS Version 1.10.AB
PS C:\> PS M:\>
PS M:\> get-wmiobject win32_bios | fl
Status : OK
Name   : Phoenix ROM BIOS PLUS Version 1.10.AB
Caption: Phoenix ROM BIOS PLUS Version 1.10.AB
IsPresent: True
Version: 1
SerialNumber: 1
CLASS  : CIM_BIOS
SUPERCLASS: CIM_ManagedSystemElement
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BIOSCharacteristics: 
ErrorCorners: 
BootOrder: 
Contract: 
CurrentLanguage: en-US
ProcessorCount: 1
Phoenix ROM BIOS PLUS Version 1.10.AB
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**Complex scripts require specialized technical knowledge and are often written by individuals who do not document their processes. When these senior resources leave, MSPs are vulnerable to service delivery interruptions to end customers and must scramble to find a replacement.**

## THE MISSING LINK – BEST PRACTICES

The real foundation for a successful automation solution starts with industry best practices, policies, and processes – these are what an MSP **must automate to achieve new breakthroughs in productivity and to achieve optimal efficiency**.

Most MSPs will agree that proven best practices and repeatable processes form the ‘secret sauce’ for running a profitable MSP business that is capable of **delivering reliable, scalable IT services to the same standards and to all customers**.

Alarmingly, and in the vast majority of cases, an MSP’s critical IP knowledge related to IT service delivery “walks out the door” at the end of every day. Documented best practices and automated processes are **the missing link** to achieve breakthrough improvements in an MSP’s efficiency, productivity, and profitability.

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## NEXT GENERATION AUTOMATION – A ONE-TWO COMBINATION

To achieve new breakthroughs in efficiency and drive consistent, repeatable and scalable IT services, MSPs need a dramatically new approach that integrates two critical elements that have, until now, never existed in the managed services industry: (1) a comprehensive library of **IT best practices** that are (2) automated by an easy to use automation engine with drag and drop functionality.

## TECHNICIAN’S RUNBOOK: BEST PRACTICES ARE YOUR BEST FRIEND

MSPs need to be one hundred percent confident that their technicians are doing things in a consistent, scalable, and repeatable fashion with no margin for error. To accomplish this, they need fingertip access to proven best industry practices and standard operating procedures that will guide all technicians and IT service delivery. N-able calls this a Technician Runbook: a compilation of best technical practices drawn from successful, profitable IT businesses around the globe.

A Runbook eliminates an MSP’s dependence on tribal knowledge – and the worrisome vulnerability this creates – and equips them with a play-by-play recipe for achieving standardized, scalable IT processes.

## A NEW ‘AUTOMATION ENGINE’

A Technician Runbook that is based on best industry practices establishes a foundation for a scalable, repeatable, best practice MSP service model. By itself, a Runbook is a source of almost limitless, enabling **potential for an MSP**. It has the potential to free technicians from the drudgery of scripting while automating tasks and processes using the very best industry practices. **To transform this potential into an operational reality**, the Runbook needs to be coupled with a powerful new automation engine that can pull pre-scripted objects from an automation library with point-and-click ease.

## AUTOMATION OBJECT LIBRARY

An Automation Object Library is a critical feature of an automation engine for the Managed Services industry. An Object Library centralizes hundreds of pre-defined, pre-tested, and re-usable automation objects for key IT tasks or processes. Each object is based on proven best practices as documented in the MSP Technician’s Runbook.

To meet the challenges of today’s MSP, an Automation Object Library must be comprehensive and provide objects that span all facets of the business and IT service delivery. Here’s a partial list of the object categories required to drive an efficient, scalable IT business:

- 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

**An Automation Object Library is a critical feature of a new breakthrough automation engine**

## BIG BENEFITS

The beauty of this type of dramatically new approach to automation is that it can be used by less senior technicians to complete a wide range of routine tasks. Equipped with this powerful one-two combination of a best practice Runbook – powered by a new object rich automation engine – an MSP will realize unprecedented, breakthrough benefits.

They can:

- Free-up all technicians to pursue higher value work
- Eliminate the need to write expensive and quickly outdated in-house scripts to automate routine tasks and processes
- Effortlessly automate all tasks and processes related to configuration management, change management, and incident management – and other tasks that technicians normally do
- Ensure all IT services are delivered to a common standard using scalable, repeatable processes
- Achieve new levels of efficiency, productivity, and profitability
- Modify objects over time to create their own unique ‘MSP secret sauce’

## THE N-ABLE BREAKTHROUGH

N-able is delivering this groundbreaking game changing automation solution today.

N-able Technologies is driving industry innovation with **Automation Manager**, a next-generation automation solution that combines **an industry first Technician Runbook** with **Automation Manager**, a powerful, state-of-the-art drag-and-drop UI automation engine. Automation Manager comes as a standard feature with **N-central**, the industry’s #1 rated **Remote Monitoring and Management (RMM) Automation platform**.

## MSP TECHNICIAN RUNBOOK – BEST PRACTICES AT YOUR FINGERTIPS NOW

The N-able Technician Runbook is offered at no cost to N-able partners to help MSPs standardize internal processes, improve profitability, and dramatically enhance IT service delivery.

The Runbook is based on N-able's extensive work and research with over 2,500 MSPs around the world. By surveying top performing, high growth Partners, N-able has confirmed and documented best IT practices and processes in the industry's first ever Technician Runbook. These processes establish the standard operating procedures and knowhow that technicians can follow regardless of experience and knowledge.

The Technician Runbook provides shorter, easier paths to complete common tasks. In so doing, the Runbook eliminates an MSP's vulnerability and dependence on 'tribal knowledge' while equipping them with a continuously evolving digital document that is easily updated in real time. For the first time in the history of Managed Services, the Runbook provides a mechanistic step-by-step approach for delivering repeatable IT services in a scalable manner based on proven best IT practices.

#### Four major sections:

The N-able Technician Runbook is an authoritative document comprised of four key sections:

- **Assessments** – provides information on "how to" and "why conduct" different assessments remotely over a customer's network over a customer's network
- **Onboarding** – key steps required to efficiently and consistently onboard a customer to ensure an MSP has configured their service delivery tools with best industry practices
- **Optimization** – documenting best practices and day-to-day tasks for a broad range of IT services from onboarding to conducting assessments and reporting
- **User cases around reporting** – this includes dramatic examples that illustrate different reports that an MSP can easily generate with the N-central RMM Automation solution to demonstrate value to their SMB customers

The heart and soul of the Technician Runbook is the optimization section – this provides automation blueprints for a best practice approach to IT service delivery. It is also **designed to be a "Wiki-like" forum** that engages both business owners and technicians in ongoing exchanges and encourages comments that contribute to evolving best practices.

**The combined power of Automation Manager coupled with the best practice Technician Runbook will enable MSPs to double or triple the number of customers they have under management – with the same technician headcount.**

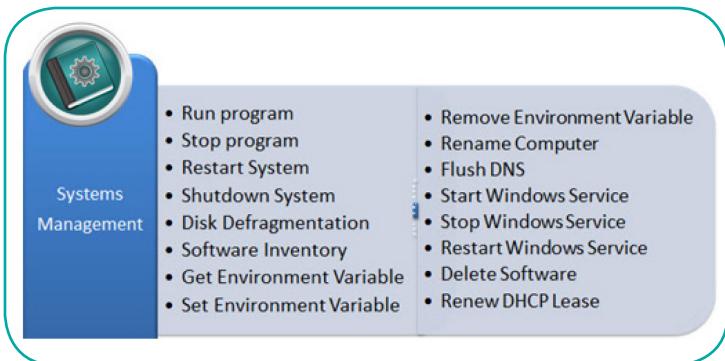
## AUTOMATION MANAGER – THE INDUSTRY'S FIRST MSP AUTOMATION SUITE

The extensive research and insight gleaned from documenting best IT practices in the Technician Runbook is efficiently leveraged by Automation Manager: **the industry's first true, drag-and-drop 'MSP automation studio'**. The driving purpose behind Automation Manager is to provide real 'out-of-the-box' automation for the majority of MSP practices – or allow an MSP to more quickly and easily create their own unique processes to differentiate their business; their own, proprietary 'secret sauce.' In essence, Automation Manager automates – with one button – the tasks that are traditionally performed by a senior lead tech.

The key to Automation Manager's success is a vast library of pre-written, pre-tested, ready-to-deploy and reusable **Automation Objects**. Objects hide the inherent complexities involved behind standard, routine tasks that support IT service delivery. If your technician needs to defrag a disk, they simply select that object in Automation Manager – as opposed to writing their own script. This enables technicians to save hours of time – and manage more devices and customers with less effort. They can rapidly design, test and debug a script or automation policy with unmatched point-and-click ease.

**Choose from 100s of pre-built MSP Automation objects**

All objects are based on documented best practices and can be used to define an automation policy using a simplified, visual drag-and-drop graphical interface. Figure 2 illustrates a series of objects created for Systems Management. Each of these objects takes seconds to select – as opposed to taking hours to write a script for each task. Imagine how much time your technicians will save – and how much more scalable and profitable your business will become.



To learn more about N-able Technologies and the game changing, breakthrough productivity gains that are now possible with Automation Manager, visit [www.n-able.com](http://www.n-able.com).

**FIGURE 2: MSP Automation Object Library – Technicians can choose from 100s of pre-written, ready to use Objects to automate tasks that support IT services – in this illustration, Systems Management.**

## TAKE ACTION NOW

The combined power of Automation Manager coupled with the best practice Technician Runbook will enable MSPs to double or triple the number of customers they have under management – with the same technician headcount.

This is why Automation Manager – in conjunction with the Technician Runbook – is a major productivity breakthrough for the Managed Services industry. For the first time, MSPs can ensure all technicians deliver scalable, repeatable IT services to a consistent standard. Specifically, Automation Manager provides MSPs with “out-of-the-box” expertise that enables them to:

- Easily automate routine and repetitive tasks
- Eliminate error prone manual tasks
- Free-up technicians for higher value tasks
- Use standardized and documented processes
- Deliver industry compliant and consistent results
- Achieve faster service delivery across physical and virtual environments
- Fully leverage “tribal knowledge” while eliminating reliance on a key tech

Automation Manager, powered by an Automation Object Library that is based on the industry’s first best practice Technician Runbook, comes standard with N-central 8.2, an award-winning RMM Automation solution from N-able. N-central is available as an on-premise software solution or as a hosted subscription based service from N-able Certified Resellers.

# ABOUT N-ABLE TECHNOLOGIES

N-able Technologies by SolarWinds 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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