10 To-do's that should be on every MSP's list

Business owners are always looking for new ways to **increase profitability, visibility, and customer satisfaction,** without breaking the bank. There are many key aspects of your business that can be capitalized on, in order to meet your goals. Below are 10 areas that every managed service provider (MSP) should carefully evaluate and improve.

1 Refresh Your Website

Today's customers are smart and they do a solid amount of research online before any purchase or investment, making your website their first impression. You can re-vamp your site by updating your content, design, and highlighting your latest products and services.

Start by evaluating your business, current marketing materials, and your tone of communication with your clients. What type of voice are you using? How can you better deliver the best representation of your company and your products? Consider your customer, and anticipate their questions and concerns. Are they being addressed in your current messaging? If not, now is the time to refine your message to better fit your audience. Talk to your Sales team (or whomever has direct contact with your customers), and see what questions consistently come up. What about your products and services? Have they expanded since your website was created? Are there new product features that your customers don't know about?

Once you've decided on your voice and your message, go through your current website and collect the information on every page for review. Unless you're completely changing your business, much of your current content may be used in the new version, or at least will be the basis for the new information. It's wise to create a copy deck of your current website in order to have a starting point for the new site. Use this document to organize your information and to start the new structure of your website. As you adapt the information in your copy deck, you can start creating a site map and deciding on the goal of each page in your new website.

As for your design, what colors are in your logo? Start with that for a color palette and decide what looks aesthetically pleasing. Do you want rounded buttons? Hard edges? Consider what each choice says about your business. Large, circular buttons may look good at first, but some might consider them childish or simple. Hard edged and ninety degree angles may look professional, but can come across as boring. Find a middle ground that you can be happy with. Think hard about it, as that design will be carried through on every page.

2 Refine Your Expertise

We have experienced some devastating natural disasters this past year and now more than ever, your customers need to know that they are in good hands. Position yourself as their trusted advisor. If you are a Datto Partner, take advantage of the free education that the Datto Academy offers and expand even more by attending an Advanced Training Seminar. Many of your clients may need help understanding all the regulations out there, such as HIPAA, PCI, and SOX. This is your chance to show your expertise in these fields.

You have the potential to position yourself beyond the technology. Becoming an advisor for clients can help you to build stronger relationships. There are many opportunities for you to find your niche and differentiate yourself and your business from the competition. Producing and disseminating well-written physical documents to your clients on these subjects can bring enormous value at a very low cost to you.

3 Improve Product Demos

Seeing is believing. A great product demonstration can show your prospect the true value of what you're selling. The first sale is selling the demo. If a potential customer agrees to attend a product demo, it means that they are interested in the solution and are open to purchasing. Having the ability to schedule frequent product demos is a proven method to improving sales. At Datto, we measure demo counts and value them very high because it's not only a fantastic sales tool, it's also a very high level of training for a potential partner.

Tailor the demo for your client based on their level of technological knowledge as well as their needs. Start by asking what the client is looking to get from the demo and what they are most interested in seeing. This is a good way to identify exactly what to focus on and it also gives you the opportunity to ask the client at the end of the demo if you've accomplished the goals that you discussed.

Expect a lot of questions and be as prepared as possible. While preforming the demo, make sure to express facts accurately to the best of your knowledge. Keep product demos to thirty minutes or less, and leave time for questions. An extremely long demo can lead the client to lose interest and thus can slow down the sales cycle. Every good presentation should end with a "soft sell" pitch. If you have accomplished all of the goals and answered the client's questions, then the final hurdle is price. If possible, avoid pricing before the demo because it will impact the client's view of the solution. Hopefully, you can end the demo with a sale and new business relationship.

4 Develop Customer Testimonials

Often, the best way to promote your business is through the words of others. Customer success stories are a powerful way to promote not only your product and services, but the overall experience that your customers have when doing business with you. As compared to traditional marketing efforts, success stories are an inexpensive method to enhance your company visibility, with a high return on your initial time investment.

Customer testimonials are very valuable and can help boost your company's credibility. New prospects are more receptive to marketing messages that come from their peers, as they feel they can relate to them and trust them. Testimonials can also "humanize" your company by conveying a personal side. Through your customer's voice, you're able to communicate the value of your company or product to a third party in a manner that is not viewed as a sales pitch, but rather as partners working towards a common goal.

Customer success stories also can have multiple uses within your promotional pipeline. Other additional uses for success stories are:

- Handouts to customers at trade shows or networking events
- Testimonials for your website
- Use in newsletters promoting your business
- Free collateral for use in your mailing lists

5 Set Customer Expectations

Customer expectations are one of the most important elements when finalizing a contract. An open flow of communication between the MSP and end user will allow both parties to define exactly what they can expect from one another. The mantra for setting customer expectations is under represent and over deliver, so that an MSP or VAR can be the hero that saved the client's company tens of thousands of dollars and thusly, offering value to your services.

In regards to data backup, clear customer expectations allow the customer to understand the process they will go through if a disaster does occur. While the MSP or VAR is there to manage the risk with support for their servers, if they need a file or server restored, the expectations are in place for the MSP or VAR to limit risk on themselves.

How To Set Your Customer Expectations:

- Service Level Agreement times are for first response, NOT for time of resolution. This is important because some issues can take longer than expected for a variety of reasons.
- Properly train your staff on SLA to avoid any miscommunication to clients.
- Understand your vendors' SLAs in order to properly set your own. For example, Datto's SLA is organized by priority levels, Emergency, Urgent, High, Normal, and Low. Emergency level issues will receive a response within 1 hour, High level issues will be responded to within 4 hours, Normal 6 hours, and Low 10 hours.
- Set estimated times for all types of restoring, i.e. BMRs, File Restores, Virtualizations, etc., that are reasonable and attainable.
- Guarantee that all issues will attempt to be resolved within the committed time frame.
- Environmental issues (i.e. Server data change, failed RAID cards) are unavoidable and should be addressed within the committed time frame.

It is good business practice to limit your company's risk by putting hold harmless clauses. Reassure your client that your job is to limit the amount of risk to the client as possible.

6 Utilize Social Media for Lead Generation

A successful social media strategy is great for lead generation, and does not have to be an extensive or expensive process for you (if you know how to navigate). By utilizing the wide range of social media outlets available, you can maintain a positive and active presence while collecting promising leads everyday.

Platforms like Facebook, Twitter, and LinkedIn are easy ways to share your business' content and collect new leads. On Facebook, find your target market by searching for your prospects and using location filters. On Twitter, follow people who tweet about relevant issues/subjects, and make sure to use hashtags in each of your tweets. LinkedIn is where you can show your expertise by answering questions, and leading discussions in the industry.

7 Improve Your Follow Up Process

There is a fine line between being a pest and letting a prospect slip through your fingers. Follow up often, but make sure you always have a reason to call (new product feature released, new promotion, free add-on, etc.). Build relationships so that you know which customers you can have a friendly conversation with and which customers are strictly business. Always ask, "What is the next step in your decision making process?" The goal of each call is to get more information. Position yourself as their on-call expert, not a salesman.

8 Build a Disaster Recovery Plan (DRP)

Create, maintain, and internally circulate a Disaster Recovery Plan (DRP) for your client's business (and even within your own business), before potential data loss happens. This is essential to any organization to ensure intelligent business continuity. A good DRP should be a well-written, comprehensive document that explains the necessary actions to be taken in case a disaster occurs. Here are some common questions that your DRP should answer:

- Who are the key contacts and what are their roles?
- What services need to be enabled first?
- What time tables should be set for restoration?

The physical, written plan is the bible of the recovery operation for an organization. It should be followed closely in order to achieve a successful recovery. From one server down, to the whole organization, the disaster recovery written plan must outline exactly what is to be done and how.

Software disks like Windows, and any other programs that require an installation, should be readily available. If this were for a virtualization, it would be important to know the approximate time of usage, in order to plan the recovery back to the physical production environment. A common first instinct in a disaster scenario is to call Tech Support. Contacting Tech Support is only one of the first things you should do, however you need to clarify the objective of the recovery first.

Make sure to keep local backups and off-site backups as up-to-date as possible. They will constantly provide a wide variety of points to restore from, and will also keep an organization running with little to no lag of possible data corruption to keep your RPO in a reliable state.

Stay calm. Restoring from a disaster is not easy, and adding extra levels of stress will not help. Plan for a longer down time then you would normally expect, it allows room for unexpected problems to get resolved. Don't let your clients get caught this year without a plan.

9 Join a Peer Group

There are valuable resources within the channel that can help you grow your business. The IT space is constantly changing, and one of the greatest things about the industry is collaboration. Peer groups are groups of individual companies that come together to discuss how to improve business. Networking, knowledge exchange, solutions to common problems, education on the latest technologies and sales and marketing strategies are the focus.

Learning from other MSPs can be extremely valuable. By connecting directly with your peers, you will be able to take away proven actionable items that you can implement within your own company. Since peer groups usually consist of members from all over the country, there is not as much concern for giving away valuable secrets that competitors can steal from you.

Most of these groups hold widespread events where members and vendors meet to build relationships, discuss relevant topics and get advice from experts. In addition to nationwide events, peer groups have online forums where you can get involved in virtual discussions. You can still take advantage of the group's resources by becoming a member and connecting remotely.

10 Attend a Trade Show in Your Area

Attending a trade show in your area is a great way to get exposure and stay educated. In a world of websites and emails, nothing can replace the value of meeting people in person. Conversations with your peers at shows will allow you to learn about what others in your industry are doing differently, and how they're using the same product or service that you use everyday. Sharing ideas and knowledge allows everybody to benefit, and creates a sense of community within the industry.

Trade shows are the perfect opportunity to see the latest and greatest products created by technology companies from all over the world. You can learn about new technologies in your space, and sometimes even get a chance to demo the product or service at the vendor's booth. Trade shows offer significant educational opportunities. If the show is a users conference, you have the chance to get an in-depth look into the products or services that you're using and allows you to learn new things that can help your business streamline processes, open the door for new ideas, or help you better use your existing solutions.

It's important to meet not only your peers, but also the industry experts that attend trade show events. Many times you'll find that the vendor host has arranged for notable keynote speakers and industry experts to speak at the event. Attend their panels, workshops or discussions and really listen, take notes, and bring back new ideas to discuss within your company. This is the perfect opportunity to draw positive public attention to your company. It's beneficial to bring more than one company employee to a trade show. Having a partner or group with you will maximize the visibility of your company and also allow more conversations.

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