

# How to Make Remote Consulting Work for You

*A 40 minute exploration into the when, why and how remote consulting & service delivery can be made a part of your business.*

Sean Costello  
 @Backgrnd\_Backup

[WWW.IRONGATE.CA](http://WWW.IRONGATE.CA)

## Some words about IronGate

- Based in Ottawa, ON, Canada since Nov '04
- Professional services provider, taking the weight off of business owner's minds.
- Staff count of 8, including multiple Apple-certified integrators & support professionals.



Consultants  
Network





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## Why do customers & consultants engage us?

- ◉ Well seasoned team, with **depth & experience** on our service and support bench.
- ◉ Trustworthy service delivery **partner**, who shares your care, concern and drive for client satisfaction.
- ◉ Not mass-marketed, not aiming for lowest cost; **nimble** enough to do what's needed, when needed.



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## **A roadmap for today's discussion...**

- ◉ Where does remote consulting fit into *your* business plan? (*Do you have a business plan?*)
- ◉ When should service be remote? And onsite?
- ◉ Which tools can help you deliver remote service?
- ◉ The value of remote notifications: repeat business!



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What are you trying to accomplish?

How will you measure success?

Will remote consulting help you achieve success?

In what ways might it actually hinder success?



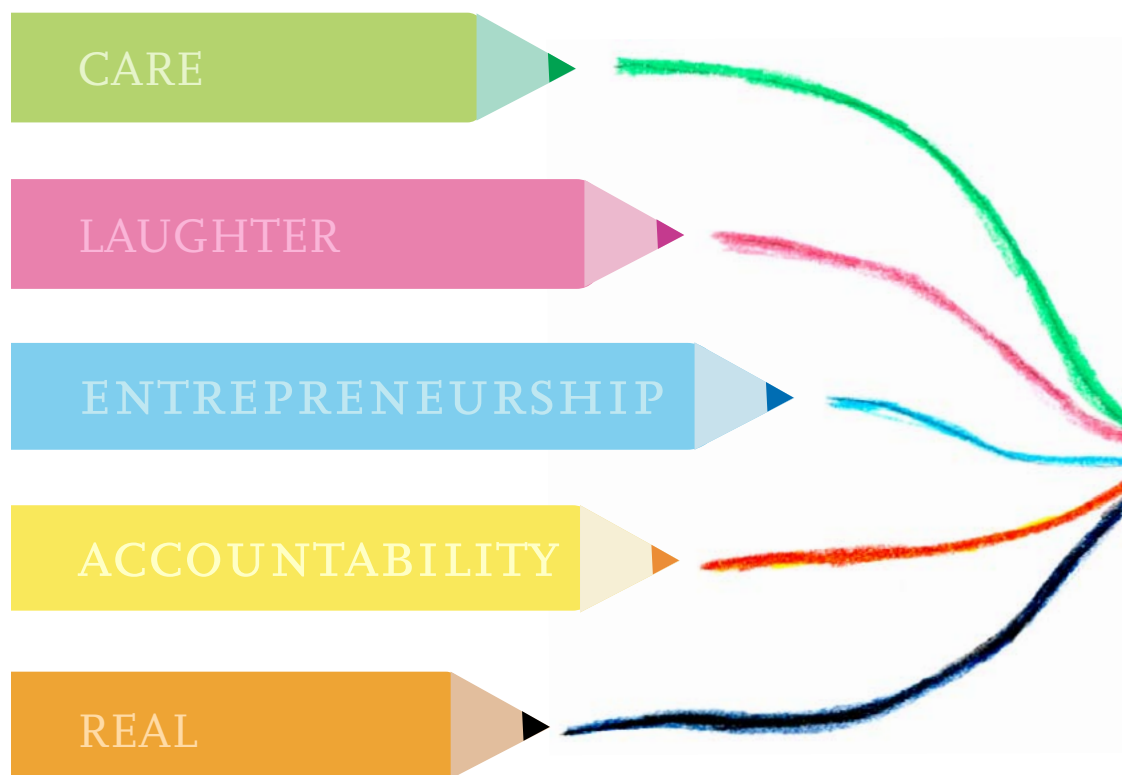
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# PAINTED PICTURE

*A vivid, mental image of PINE VILLAGE PRESCHOOL in September 2012.*



*The best way to ensure  
the reality of our  
visions and dreams is to  
create them, together.*



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### CORE VALUES

We are a values-driven business – everything begins and ends with our values in-mind. We always stay true to our values because our values are our essence and true identity. Values are who we are. Our values are C.L.E.A.R., and we are C.L.E.A.R. in everything that we do:



- C** **Care.** We care by hugging, by listening and by truly giving.
- L** **Laughter.** We have fun in all that we do. We know everyone involved with our organization (our children, our families, or colleagues and our community) well enough to be able to really laugh with them.
- E** **Entrepreneurship.** We are passionate, and we constantly seek to better ourselves and everything around us. We are *not afraid* to take risks – we *take* them!
- A** **Accountability.** We do what we say, when we say we will do it. We hold ourselves, and each other to our promises and our values.
- R** **Real.** We are genuine and honest. We communicate always.

### TWO MISSIONS

We are an organization with both an educational mission and an organizational mission. Each of our missions reminds us of what we do, and why we do it:

**Educational Mission:** To educate and nurture each child's individuality within a culturally diverse, bilingual community, so that every child develops a true passion for learning and an ability to engage in any environment and community.

**Organizational Mission:** To bring dreams to life, so that people may live successful and abundant lives.



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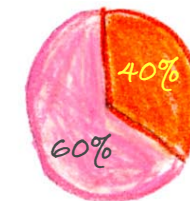
### STRATEGIC VISION

We are in **10 urban centers** across the United States: Boston (MA), New York City (NY), Philadelphia (PA), Chicago (IL), Los Angeles (CA), San Diego (CA), San Jose/ San Francisco Bay Area (CA), Phoenix (AZ), Miami (FL) and Houston (TX).

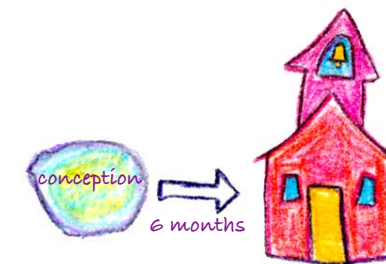
We have a saturated presence in 6 urban centers with at least 8 preschools in those saturated urban centers.



Each of our schools generates at least **\$1M** in revenues with 60% deriving from tuitions and the remaining 40% from other services and programs. Each school has a contribution margin of 25%.



It takes **less than 6 months** from conception to "doors open" for new schools. Cash flow never drops below negative \$25,000 in opening a school, as the majority of financing for all new schools are through prospective families. We are 95% enrolled in all new schools at least one month prior to inaugural opening.



Across all our schools, we are educating **5,000+ children** on an annual basis, which continues to grow exponentially. And, we offer financial aid and scholarships to over 50% of families whose children are enrolled in our schools.



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### OUR CULTURE

Everyone believes that we are creating a world-class organization that makes desirable, significant impacts on all lives we touch. We **celebrate all our successes**, and openly heal and learn from our failures.

Employees enjoy the addition of a new – creative, yet valued – benefit every year. All employees are excited to take part in deciding where the annual, company-wide trip will be this year.

We are special and powerful because we have a **Dream Manager**. Our Dream Manager has helped every employee within our organization achieve at least one of their life-long dreams. The impact of our Dream Manager has been so significant that we have begun to help our families achieve their dreams – we have helped one family do so.



### OUR PEOPLE

Our teachers are *amazing*! They are from **all over the world**, and they bring with them so many unique life experiences and cultural perspectives. They *love* to learn-and-share, and to make memorable, significant impressions on the children they guide every day.

We obsess over having, and over keeping the right teachers and people. We have a world-class, rigorous hiring process that we know produces mutually-enriching **long-term relationships**. We hire, and we fire based on values. Positions remain open for less than 2 weeks because we are constantly looking for the right people, and the right people are looking for us.

Our on-boarding process is phenomenal. We ensure every single person who works within a school experiences "Training Town." The training produces confident, excited teachers and directors.

People are so blown-away and moved by our organization, that over 50% cry before they start teaching our children.

Less than 5% of teachers leave annually, and 95% of our teachers' tenures are at least 3 years. Why? Because they are **happy**. Because everyone is comfortable and confident in their roles, and each has a clear path to where she or he can be in 3 years.

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### MENTOR BOARD OF ADVISORS

Consists of 8 individuals who each possess at least 20 years of experience with C.L.E.A.R. values. The eight follow: a Chairman of a 200+ unit childcare company, a CEO who has grown an organization from \$20M to \$1B, a People/Relationship expert, a Location expert, a Money expert, a Marketing/PR expert, a Child Psychologist expert, and a Language Expert.

### LEADERSHIP

Everyone is inspired by the leadership team we have in-place, and is excited with new ones planned. Leadership can be seen **everywhere** in our organization.

Our executive team **embodies C.L.E.A.R. values**, and has direct experience with rapid growth similar to the growth that is planned for the proceeding three years. Why is executive team here? Because they want to move from success to significance in their careers.

### OUR BRAND

Our schools are recognized as being prestigious, but not exclusive. Are academics are respected, but not rigid. We are known for creating life-long, impressionable and memorable experiences validated by children and families.

Anyone who walks into any of our preschools feels they are in a Pine Village Preschool school, *yet* each school would have its own unique soul that is drawn from *both* the community it serves *and* the teachers and director that lead it. Our C.L.E.A.R. values are unmistakably felt.

As an organization, we are looked upon as the innovative leader in early childhood education. Our brand is immersion, and we own this category in the market – our brand is felt at every point of contact.

 **We are seen as the place where dreams can be fulfilled.** 

When we begin to enter new territories, there is an incredible “buzz” and excitement from the communities and families because they have heard about the impact we make; they help us with our success. We are contacted regularly to enter new territories by families. We hear on a regular basis, “We/Our child/Our community needs Pine Village Preschool.”

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### CUSTOMER SERVICE

Families provide ongoing, “real” feedback about our schools and about anything because the process is easy, *and* families feel each opinion will be heard and responded to respectfully, quickly.

We offer many **innovative**, convenient and valued services for families. We have just begun testing dream managing for families.

We are no longer being compared with how other preschool or childcare providers provide customer service, but other world-class organizations known for their customer service.

### COMMUNICATION

Internally, teachers across all schools regardless of geography have relevant, impactful support networks where they are able to **hear** and **share** experiences from other teachers the same day an issue is surfaced.

Families hold confidence and comfort in the speed and convenience of **connection** and **depth** of information that can be gained. Families are constantly amazed by how much the teachers and directors really *know* their children and our ability and willingness to relay that information.

Our organization plays a leadership role in a state or national bilingual education association.



### SYSTEMS

Our ability to make and execute on decisions quickly, increase because we have the systems to gather information and communicate effectively. We have **real-time access** to financials, key metrics and information of our business that lets us effectively measure and monitor our exponential growth. We have **visibility** 12–36 months out for each school in various business areas, including enrollment and people

In holding true to our Entrepreneurship value, an idea with a champion, someone who will spearhead an initiative, can begin testing within 4 weeks from conception.



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CARE


LAUGHTER

ENTREPRENEURSHIP

ACCOUNTABILITY

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### MEDIA

We are seen in the media at **least once per week** in every market we have presence. We are being featured more frequently by regional and national media channels (including The Wall Street Journal and USA Today), and are seen as the growing expert for early childhood education. We have been featured in a television, book and music production for young children that align to our C.L.E.A.R. values and our educational mission. We are the predominant preschool mentioned in social online networks in markets where we have presence.

### PROFITABILITY

Although we are rapidly expanding, we ensure that schools that have been in operation for 12 months are at least at 25% contribution margin. We allocate **10% of our profits to charity**. We allocate **10% of our profits to dreams**.

### SUCCESS

Our success is represented in several different ways. Most fundamentally, everyone in the entire organization lives and breathes our **C.L.E.A.R. values**. Employees tell us at least once per week that they cannot imagine a better place to work. Our annual company retreat is attended by 95% of the employees. Families, current and alumni, constantly write us to praise and thank us on the impact of our schools on their children and families. All schools are at least 95% enrolled with waitlists. We have had one offer to buy our organization by a national childcare provider.



*"Dream  
no small dreams  
for they have  
no power to move  
the hearts of men."*

*— Johann Wolfgang von Goethe,  
German Author.*

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**Want to help us make our dream a reality?**

**We'd love to hear from you.**

Contact: Jasen Lew | [jasen.lew@gmail.com](mailto:jasen.lew@gmail.com) | 650.743.7048



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## Remote consulting - a quick analysis

<b>PROs</b>	<b>CONs</b>
Able to deliver service from practically anywhere	Risk of being forgotten; Out of sight, out of mind
Able to assist mobile clients, regardless of their locale	Clients develop expectations regarding your availability
Low cost of service delivery	Risk of over-committing, with respect to the “perfect storm”
Recurring revenue stream	Risk of being displaced, if a relationship doesn’t take root

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**What services actually  
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**When will calls get  
booked, and clients  
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**How will you establish  
and maintain client  
relationships?**



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## **2) What kind of situations and services lend themselves to remote delivery?**



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Ideally, you would be asked to work on:

- Pre-configured and stable hardware
- Installing, configuring or demonstrating software
- Providing support, or gathering statistics / metrics
- Delivering a Software-as-a-Service (SaaS) solution

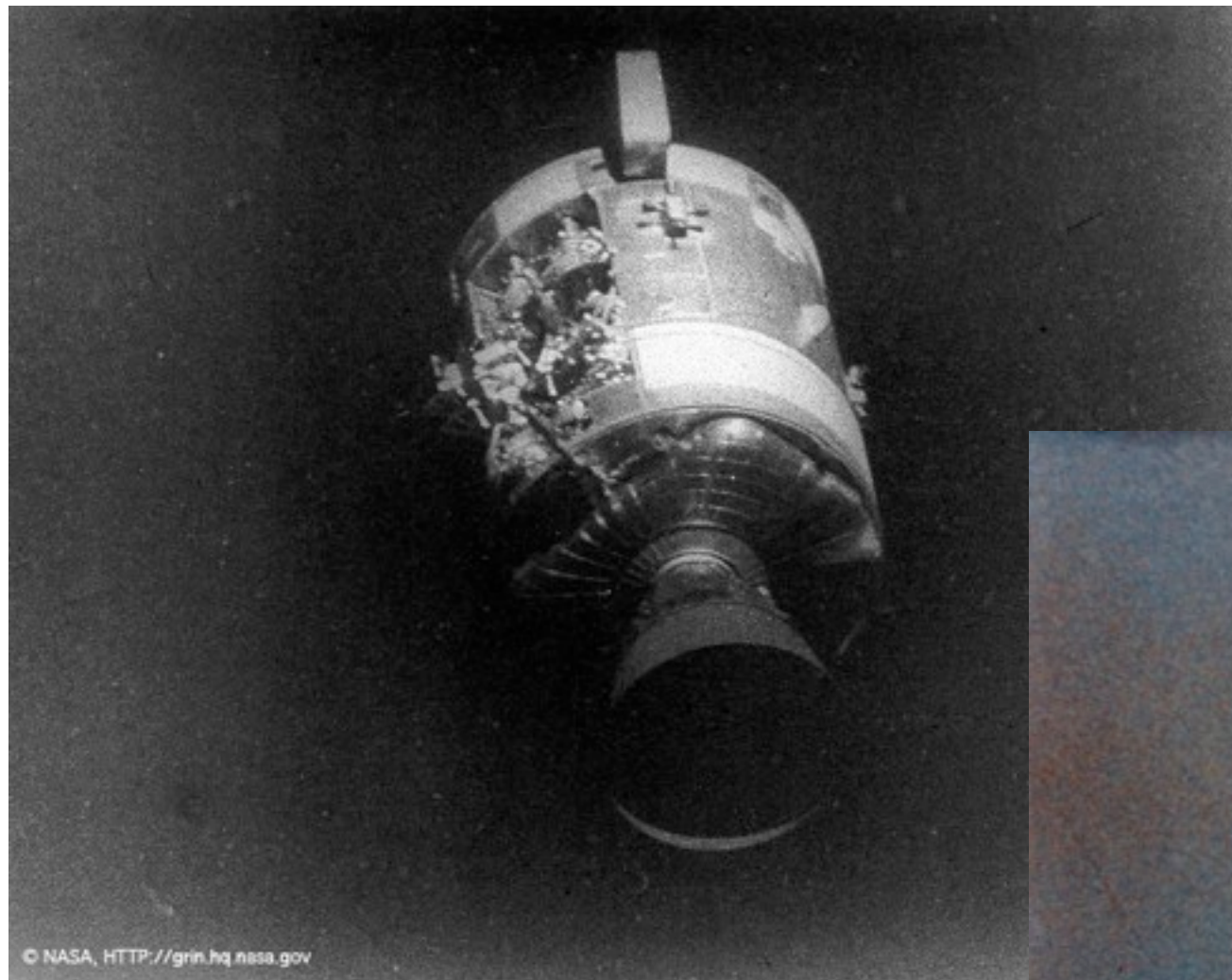
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Sometimes, however...

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# **So, what kind of situations generally DO NOT lend themselves to remote service delivery?**

Experience has led me to be wary of...

- Tasks that require ‘hands to leave the keyboard’
- Bare metal rebuilds, unless part of a proper plan
- Plug/unplug, hardware-dependent configurations
- “Well, just have a quick look. Do what you can.”
- A 2nd call for a repeat issue; certainly the 3rd...



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The good news is, with adequate resources, the right attitude and a whole bucketful of commitment to a successful outcome, even the most outrageous and unimaginable challenges or assignments can be overcome. It won't be inexpensive, nor easy, but...









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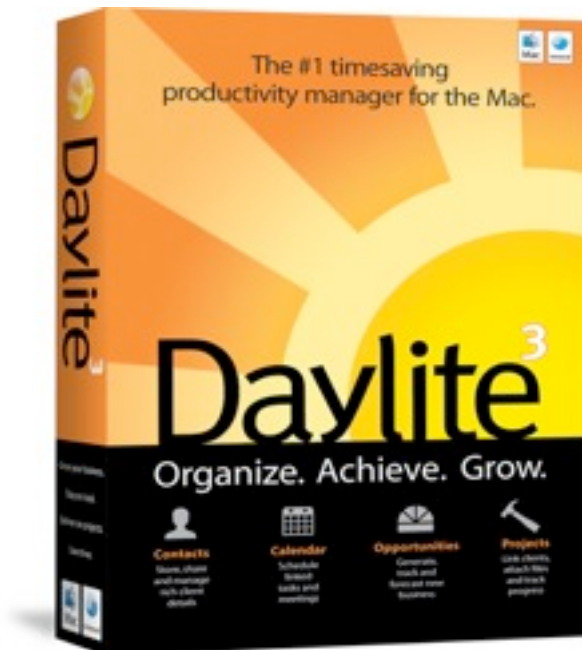
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### **3) What tools can you use to help deliver your consulting services remotely?**

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First, let's break the engagement up into phases:

- Introductions; fact gathering; estimation & quoting
- Signing on: consensus about 'definition of success'
- Planning, arranging and executing your plan/recipe
- Confirmation of achievements; documentation
- Signing off: you've come this far - make it formal!





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**LogMeIn**



**Web Help Desk™**  
Powerful Software for Technical Support



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## Executive Summary

- ⦿ There are very real and non-trivial costs to performing work in person and onsite all the time; providing your skills remotely makes good sense - when its qualified and planned. ***Failure to plan, is planning to fail.***
- ⦿ Plan for and budget an occasional break to the mold, and deliver service (or simply visit) onsite even when you could have done what you needed to remotely - just to invest in the personal and intangible relationship. ***People value more than just their goals & objectives being met, and you should always remember: 100% of your customers are people.***
- ⦿ *Assemble and leverage a network of trusted peers to provide ad-hoc coverage and assistance when you need a break, a hand, or just an ear.*



## Contact Information:

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