THE
Orchard
I.T.

How to Make Remote Consulting Work for You

Presenter:
Christopher R. Holmes
chip.holmes@gmail.com

Connection: Deepening Client and Consultant Relationship

“It takes 20 years to build a reputation and five minutes to ruin it. If you think about that, you'll do things differently.” - Warren Buffett

Positioning Yourself as an expert in an area

- Know what you know (and prove it)-Get certified
- Know what you do well (and leverage it)- Get focused
- Know what you don’t do well (and admit it)- Get help

Partner with other Service Providers

- Character- can you trust them with your
- Communication- do they document
- Consistency - sloppy or shaped up

*At the end of the day contacted consultants are a proxy, make sure they represent you well.

Remote Consulting: Breaking, Shaking, or Remaking the mold

“Risk comes from not knowing what you're doing.” Warren Buffett

What services lend themselves to remote consulting

- Instant support (Phone or Screen Sharing)
- Back end maintenance (Software Updates, Backups,)
- Troubleshooting (Ideally Not Network Related Issues)
- Directory Service Administration

What are you trying to accomplish?

- Increase availability (Of I.T. Staff)
- Reduce TCO (For Business)
- Reduce downtime (For the Customer)
- Increase profitability (For your company)

*Time is money and having the convenience of remote support saves you travel time and the

How will you measure success?

- Make a list
- Make a list
- Make a list

*If you aim at nothing you will hit it every time

Will remote consulting help you achieve success?

Success: “The accomplishment of an aim or purpose”

- Communication- Makes you available and accessible to make sure things are on track.
- Coordination- Better scheduling an preventive measures help keep client up and satisfied.
- Consensus- With solid goals and to-do list things

In what ways might it actually hinder success?

- Availability- don't over extend your perceived time
- Attitude- don't take out stress on the client
- Awareness- make sure you know what your jumping into and set reasonable expectation

  * depending on your decision making you are either your best friend or worst enemy

Remote Consulting Pros (The Hot)

Foundation: Cultivates Customer Confidence

-Able to deliver service from practically anywhere

-Low cost of service delivery

-Able to assist mobile clients, regardless of their locale

Financial: Recurring revenue stream

- Service Level Agreement
- Retainers
- Pre paid Hours/Support plans
- Monthly maintenance

Remote Consulting Cons (The Nots)

Remote Consulting: If you don't want to get wet don't walk in slippery places

-Risk of being forgotten; Out of sight, out of mind

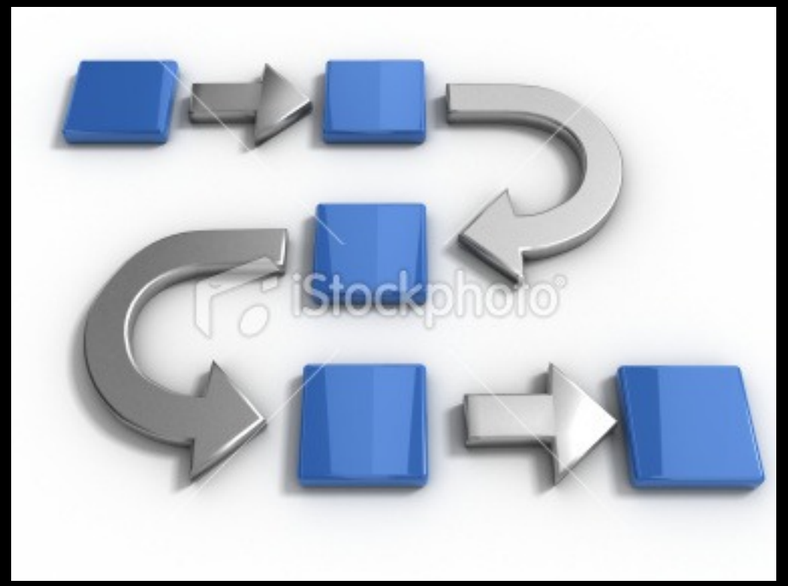
-Clients develop expectations regarding your availability

-Risk of over-committing, with respect to the "perfect storm"

-Risk of being displaced, if a relationship doesn't take root

Remote Consulting: Professionally Planned Support

One machine can do the work of fifty ordinary men. No machine can do the work of one extraordinary man. – Elbert Hubbard



Collaboration: How to make things happen

- Have a “hub” person. They need to be responsible for scheduling. Even a call needs to be scheduled.
- Schedule on a calendar that pushes to technicians.
- Pre-Pay, Pay as you go it doesn’t matter. Collect as soon as the job is done. (Lightspeed, Quickbooks Online, Freshbooks, Etc..)

How will you establish and maintain client relationships?

- Follow Up-Create follow up calls after a project. Set re-occurring follow up calls once a month or every other week. (Email or Call)
- Follow Through- Make good on what you say you will do.
- Follow Tech Trends- Be “There guy” and send notes when news technologies come out that they might need/want.

Introductions; fact gathering; estimation & quoting

- Determine the scope of the project
- Disclose scope of your service provision
- Decide method of billing (Flat Rate, Pre-Paid Hours, or as you go billing)

Signing on: consensus about ‘definition of success’

- Identify the Problem or Goal
- Intentionally cover what steps you will take.
- Involve the Customer throughout the process

Planning, arranging and executing your plan/recipe

- Privately plan for worse case situations. Go in honest.
- Professionally prepare yourself to do the work. Go in hopeful.
- Personally be willing to make things happen no matter what. Go in heroic.

Confirmation of achievements; documentation

- Time Stamp: Make sure you have name, time, date, customer, and how many billable hours.
- Break down by hour. (Not always necessary but then again you are exchanging time for money)
- Itemize what you did and how you did it.

Signing off: you've come this far - make it formal!

- Retainers
- Contracts
- Service Level Agreements

Remote Consulting: Tools of the trade

Do not wait; the time will never be "just right." Start where you stand, and work with whatever tools you may have at your command, and better tools will be found as you go along.

-George herbert

iChat Screen Sharing as a solution? Pros and Cons

MacHelpMate

1. Zero-config screen sharing through firewalls and routers by invitation for unlimited client installations (no port forwarding)

2. Mac HelpMate ZIRO (Zero Interaction Roll Out) for one-click screen sharing by emailed link or web site link with no preinstallation required. Watch Mac HelpMate ZIRO Video, click here.

3. Mac HelpMate Widget for one-click screen sharing

4. Custom application branding to reinforce your company, school, or consultant support services

5. Unlimited installable proactive alterts for kernel panics, S.M.A.R.T, low disk space, Time Machine backup failures and low memory via zero-config email (no SMTP setup or authentication required) to up to five email addresses at a time

6. 200 diagnostic, troubleshooting, and performance optimization items all in an application with *your company's logo*

7. 40% faster than Apple Remote Desktop over the internet - includes built-in viewer with screen scaling

8. 128-bit AES encryption - unbreakable security used by the US Military and FBI

9. Supports Mac OS X 10.3, 10.4, 10.5 and 10.6

10. Use the built-in Viewer or the Mac OS X Screen Sharing Application

11. Screen Sharing Application provides support for Macs with multiple monitors

12. Screen Sharing Applications supports fast user switching

13. Connect to remote computers over Bonjour

14. Use Bonjour to access the CLI from Terminal on the remote machine to run commands, update software, and do diagnostics in the background

15. Zero-config file sharing that respects Mac OS X permissions

Apple Remote Desktop

●Asset Management
Remote Spotlight search
User History report
Application Usage report
File Search report
Software Version report
Software Difference report
System Overview
Storage report
FireWire Devices report
Network Interface report
PCI Card report
Memory report
USB Devices report
Scheduling

●Software Distribution
Package installation
File Copy
Remote Assistance
Observe and control screens of remote Mac computers

Observe and control multiple screens of remote Mac or VNC-enabled computers simultaneously
Screen sharing and text communication

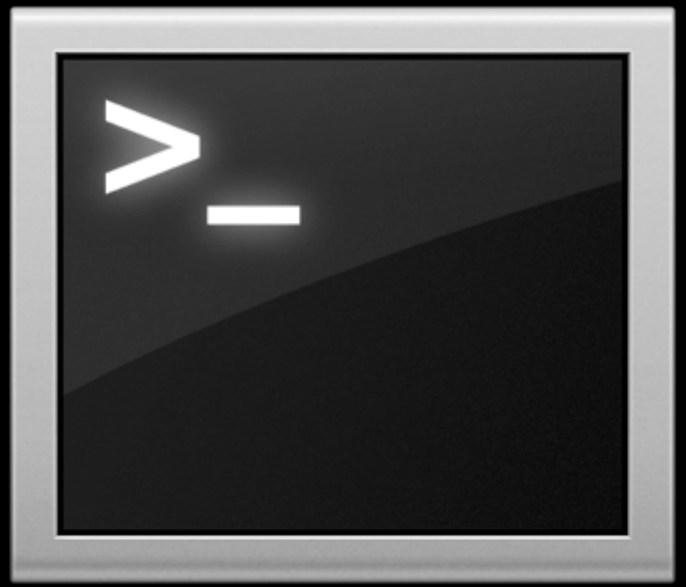
●Remote Administration
Manage systems remotely
Send UNIX commands to a group of Mac OS X systems.
Set startup disk
Rename Mac OS X computers
Change Apple Remote Desktop Client settings

VNC

- Built into Mac OS X
- Chicken of the VNC (Mac)
- Real VNC (Windows)
- iChat & Finder
- *Plenty of iOs Apps

SSH

- Built into Mac OS X:
- For login to a shell on a remote host (replacing Telnet and rlogin)
- For executing a single command on a remote host (replacing rsh)
- Secure file transfer
- In combination with rsync to back up, copy and mirror files efficiently and securely
- For securely mounting a directory on a remote server as a filesystem on a local computer using SSHFS.
- For automated remote monitoring and management of servers through one or more of the mechanisms as discussed above.



1. **Remote Access**
   Work on your Mac® or PC from any Internet-connected computer in the world.
2. **Easy Installation**
   After downloading, GoToMyPC automatically launches, installs and configures itself, with no restart required.
3. **Encryption and Security**
   (3 min 58 sec)
   All data is protected with 128-bit AES encryption. Account access is protected by dual passwords and end-to-end user authentication. Enables HiTech and HIPAA compliance.
4. **Mobile Access**
   Use GoToMyPC from an iPad® – now available on the App Store. (GoToMyPC subscription required.)

1. **Keyboard Locking & Screen Blanking**
   Prevent others from using the mouse or keyboard or viewing the monitor of the computer while you are remotely connected.
2. **Multi-Monitor Support**
   (1 min 16 sec)
   View the full displays of your computers, even if it is using multiple monitors.
3. **Sound**
   Hear sound coming from the computer you are accessing.
4. **Guest Invite**
   (2 min 32 sec)
   Invite a person to temporarily view or share control of your computer from anywhere.

GoToAssist is Web-based remote-support technology that enables support professionals to resolve their customers' technical issues online using shared screen, mouse and keyboard control and other Web-based tools.

When your customers connect to your GoToAssist support sessions, they download a small, self-installing plug-in, which allows you to view their desktop, share control of their mouse and keyboard and perform remote-support tasks. During live support sessions your customers can retake control of their computers just by moving their mouse.

Logmein

Unattended Remote Access:

Web-based user interface
Deployment
User management
Host Configuration
Computer search
Online/Offline Status
Reporting
256-bit SSL encryption
Audit Logging
Automatic login
Computer grouping
Advanced reporting and analysis

Teamviewer

One solution for everything
While most competitors offer different packages for remote support, remote administration, training and sales (and also charge for them...) TeamViewer is the one-stop solution for everything you need: TeamViewer includes all modules in one simple and very affordable package.

Remote administration of unattended servers
TeamViewer can also be used to control unattended computers and servers. System service installations even allow remote reboot and reconnect.

File transfer
TeamViewer comes with integrated file transfer that allows you to copy files and folders to and from a remote partner - which also works behind firewalls

Highest security standard
TeamViewer is a very secure solution. All versions feature completely secure data channels with key exchange and AES (256 Bit) session encoding, the same security standard used by https/SSL.

Online status display
Are your team members in many different locations? Need to present your desktop or collaborate on a document? In the TeamViewer partner list you can see who is available and connect with them in one mouse click.

Remote support without installation
With TeamViewer you can remotely control any PC anywhere on the Internet. No installation is required, just run the application on both sides and connect - even through tight firewalls.

Remote presentation of products, solutions and services
TeamViewer allows you to present your desktop to a partner. Share live demos, products, and presentations over the Internet within seconds.

Works behind firewalls
The major difficulties in using remote control software are firewalls and blocked ports, as well as NAT routing for local IP addresses.
If you use TeamViewer you don't have to worry about firewalls: TeamViewer will find a route to your partner.

Browser based access
On the road and need to control a remote computer? Why don't you use TeamViewer Web Connector? The purely html and flash based solution can be used from nearly any browser and operating system.

Very competitively priced, free versions available
TeamViewer offers great value for low prices. TeamViewer even offers a free version for non-commercial use.

Optimized performance
Whether you have a LAN or dial-up connection, TeamViewer optimizes display quality and speed depending on your network connection.

JAMF, Absolute Software

The Casper Suite is a powerful framework around which your IT ecosystem can be unified and extended to manage both Mac OS X and iOS devices from a single console. Normalize your IT administration with the only client management solution developed exclusively for the Apple platform.

Mac OS X:

-Inventory

-Imaging

-Patch Management

-Software Distribution

-Remote Control

-Settings and Security MGMT

-License MGMT

-Usage MGMT

iOS:

-Inventory

-Configuration

-Security MGMT

-App Distribution

Remote Consulting: Choosing quality of service over quantity of service (Part 1)

“Quality is never an accident; it is always the result of high intention, sincere effort, intelligent direction and skillful execution; it represents the wise choice of many alternatives.” -William Foster

Quality Services that work (Remotely)

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

Remote Consulting: Choosing quality of service over quantity of service (Part 2)

"Quality is doing it the first time right."

-Unknown

Services that work best (Onsite)

- 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...

Principles to Remember

- Sometimes when we are sincerely trying to help, we are sincerely wrong
- The right thing at the wrong time is the wrong thing.
- If reducing cost increases frustration then you are actually making things worse.
- If it’s a choice between quality and cost. Quality should win.

Remote Consulting: Know What services the customer needs before they ask

"Customer satisfaction is worthless, customer loyalty is priceless. "

-Jeffery Gitomer

Communication:Virtual Telephone System

- Grasshopper
- Google Voice
- Skype
- Phone.com
- Kerio Operator

Documentation: How to remember things

- Evernote
- Google Docs
- Kerio Workspace

Collaboration: Ways to make schedules where not everyone is

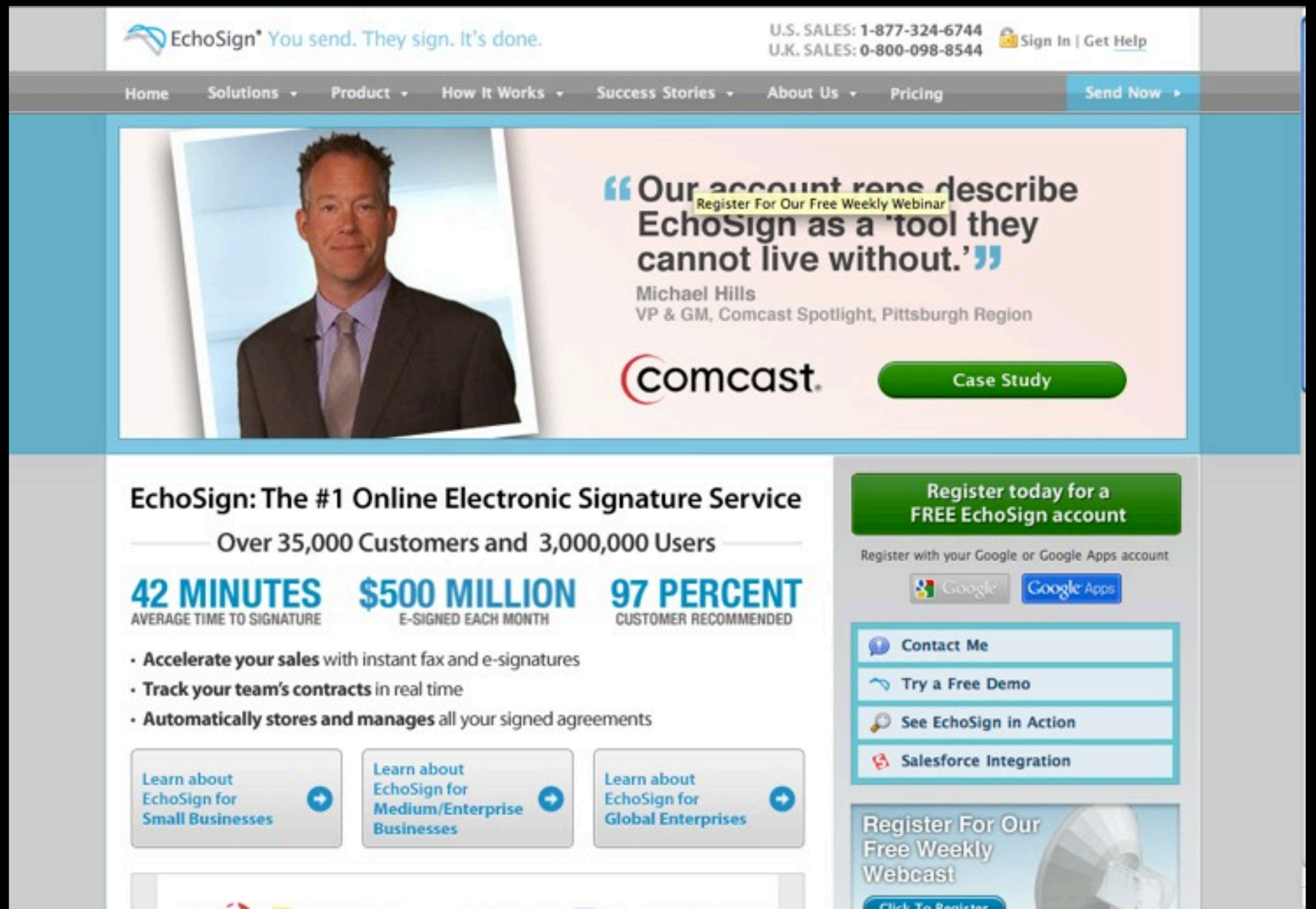
- Tungle.me
- Google Calendar
- iCal Server/Wiki
- Zendesk.com

Organization: Prioritization and Task Setting

- Daylite
- OmniFocus
- Teamly
- Basecamp

Secure signing: It’s binding.

EchoSign: Any PDF, upload it for where people should sign,



Invoicing: Freshbooks

Pages or Word

WebHelpDesk

Client Monitoring: Awareness is the first step to attention

Watchman: Monitoring and reporting

Crashplan: Backup Monitoring

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.