Remote Consulting

Luis Giraldo
Monkey Mac Consulting Inc.

www.monkeymac.com

BEFORE WE BEGIN...

- List of useful links and resources:

  monkeymac.com/mactech

- vcard: monkeymac.com/luisgiraldo.vcf

About Luis

Music › Jazz › Luis Giraldo

Luis Giraldo

Albums

Sort By: Best-sellers

It's Always You
Luis Giraldo
Released Jul 06, 2008
$9.99 BUY

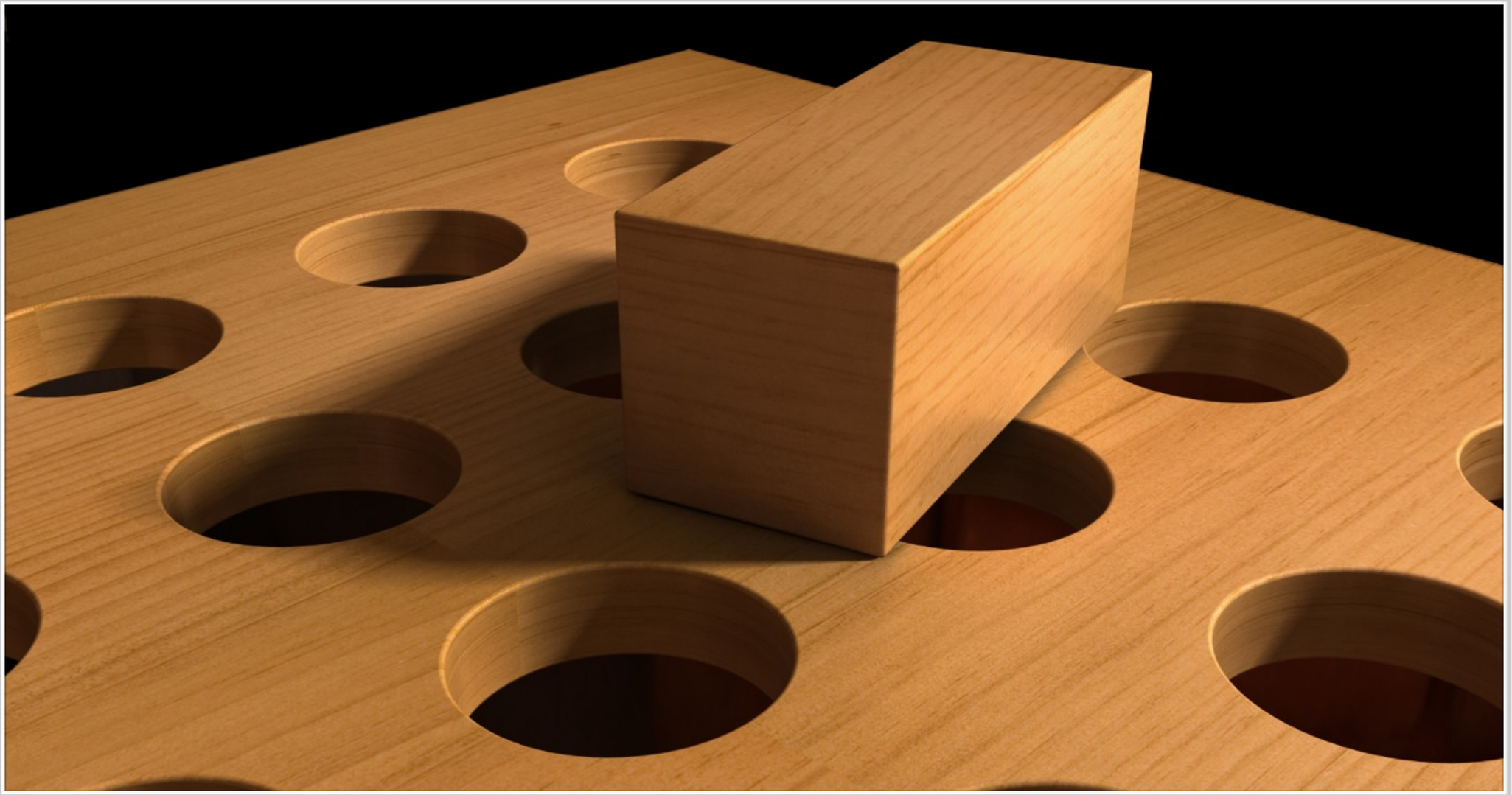
Day Dream
Luis Giraldo
Released Sep 09, 2002
$9.99 BUY

Agenda

- Engagement
- Suitability
- Experience
- Relationship
- Tools
- Q&A

Engage

- Customers and peers alike
- Expert status
- Trustworthy provider, credentials, certifications
- Strategic partnerships
- Collaboration



Where does it fit?

- What services will/can you offer?
- What is the goal?
- How will you measure success?
- What will the client experience be?
- How do you price it?
- Pros and cons of remote consulting

Services

- Break/Fix Support
- Monitoring servers/services
- Training
  - One-on-one
  - Group, Webinars
- Security/Firewall testing
- Hosting
- Setup of Hosting
- Managed Services
- Unattended maintenance

What Doesn't Work

- 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."
- Not planning appropriately

"We judge others by their actions.
We judge ourselves by our intentions."

Ian Percy

"ADVICE IS JUDGED BY RESULTS,
NOT BY INTENTIONS."

Cicero

Defining Goals

- Sign on *x* new customers from a neighbouring state.
- Increase consulting sales by *x*% within 3, 6, 12 months.
- Leverage existing time and increase gross margins by *x*%.
- Increase MRR to *x*% of my monthly income.
- Spend *x* more hours per day with my spouse and/or family.

Measuring Success

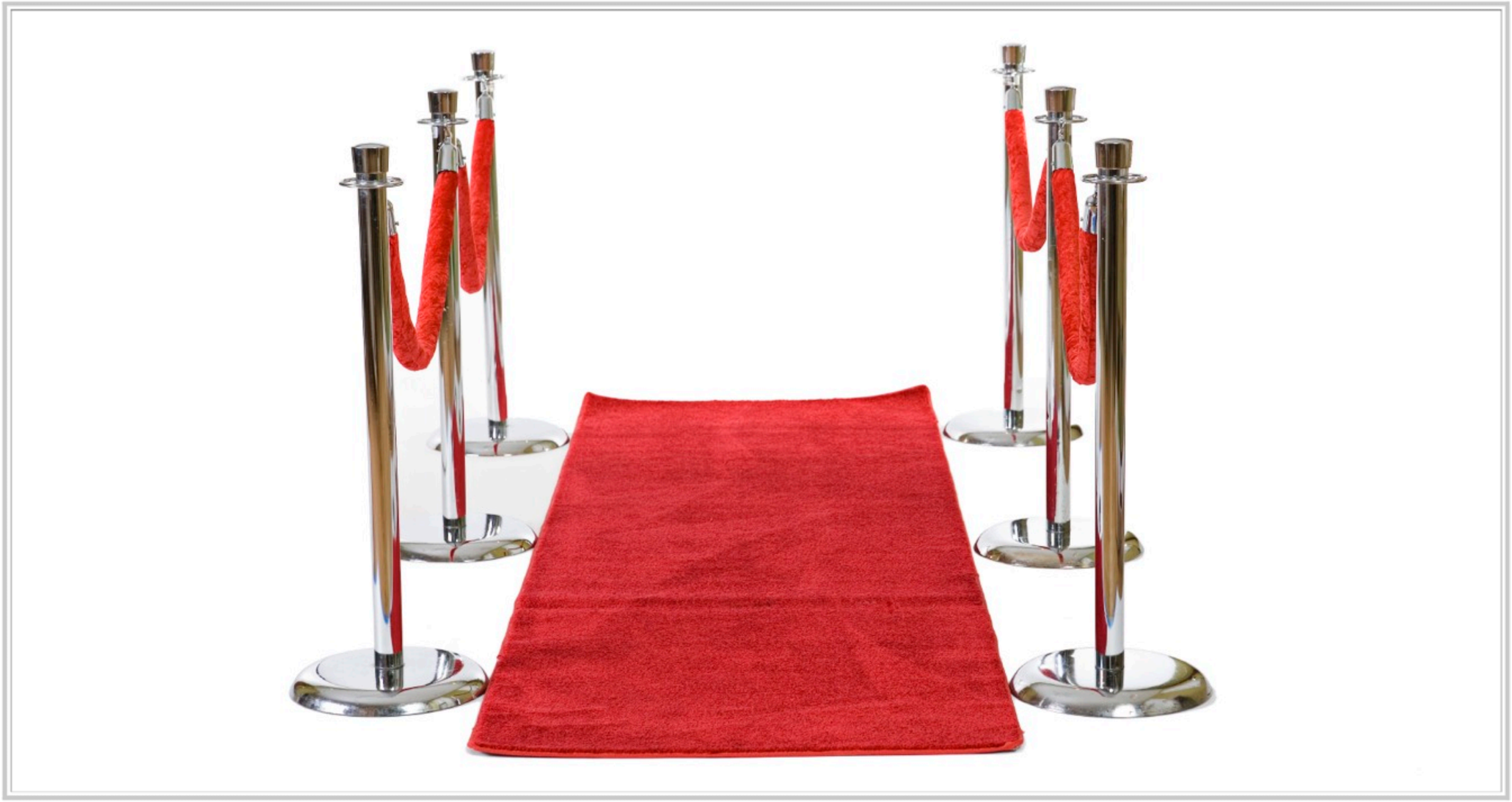
- Achieving goals
- ACN ratings
- Testimonials and case studies
- Referrals
- Happiness and life balance

Pros

- Less travel (environmentally friendly)
- More time with family
- Access to more customers
- Able to deliver service from practically anywhere
- Able to assist mobile clients, regardless of locale
- Low cost of service delivery
- Possible recurring revenue streams

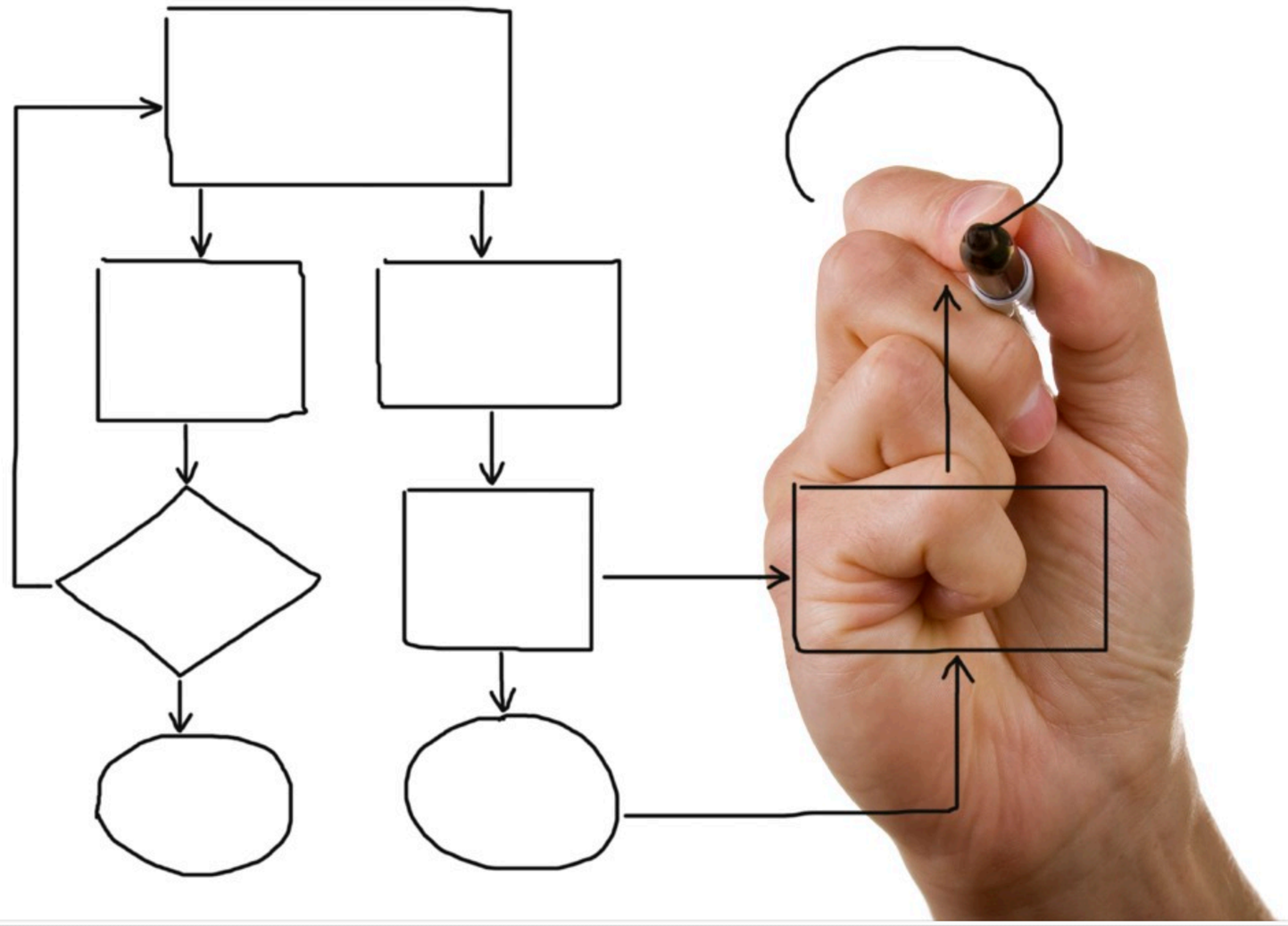
Cons

- Lack of privacy for uninterrupted work (spouse/baby/pet)
- No differentiation between personal/work time
- Some services can't be performed remotely
- Credibility factor (clients like face-to-face)
- Risk of being forgotten; Out of sight, out of mind
- Clients develop expectations regarding your availability
- Risk of being displaced, if a relationship doesn't take root



Managing The Experience

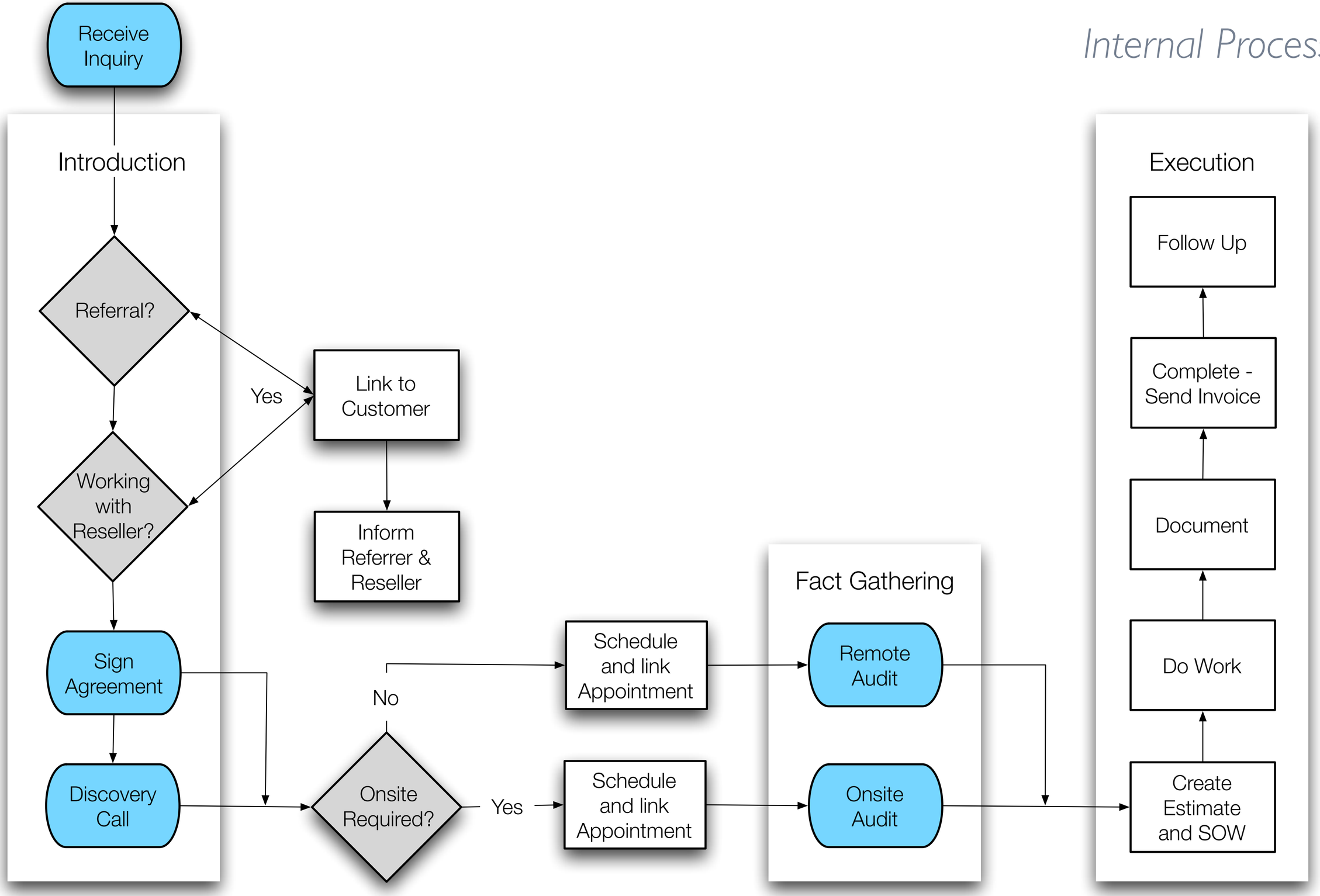
- What will the whole process look like?
- How are clients first introduced to your company?
- How do clients request and pay for service?
- How will clients refer you?
- How will you follow up / keep in touch with clients?
- Lay down the ground rules!



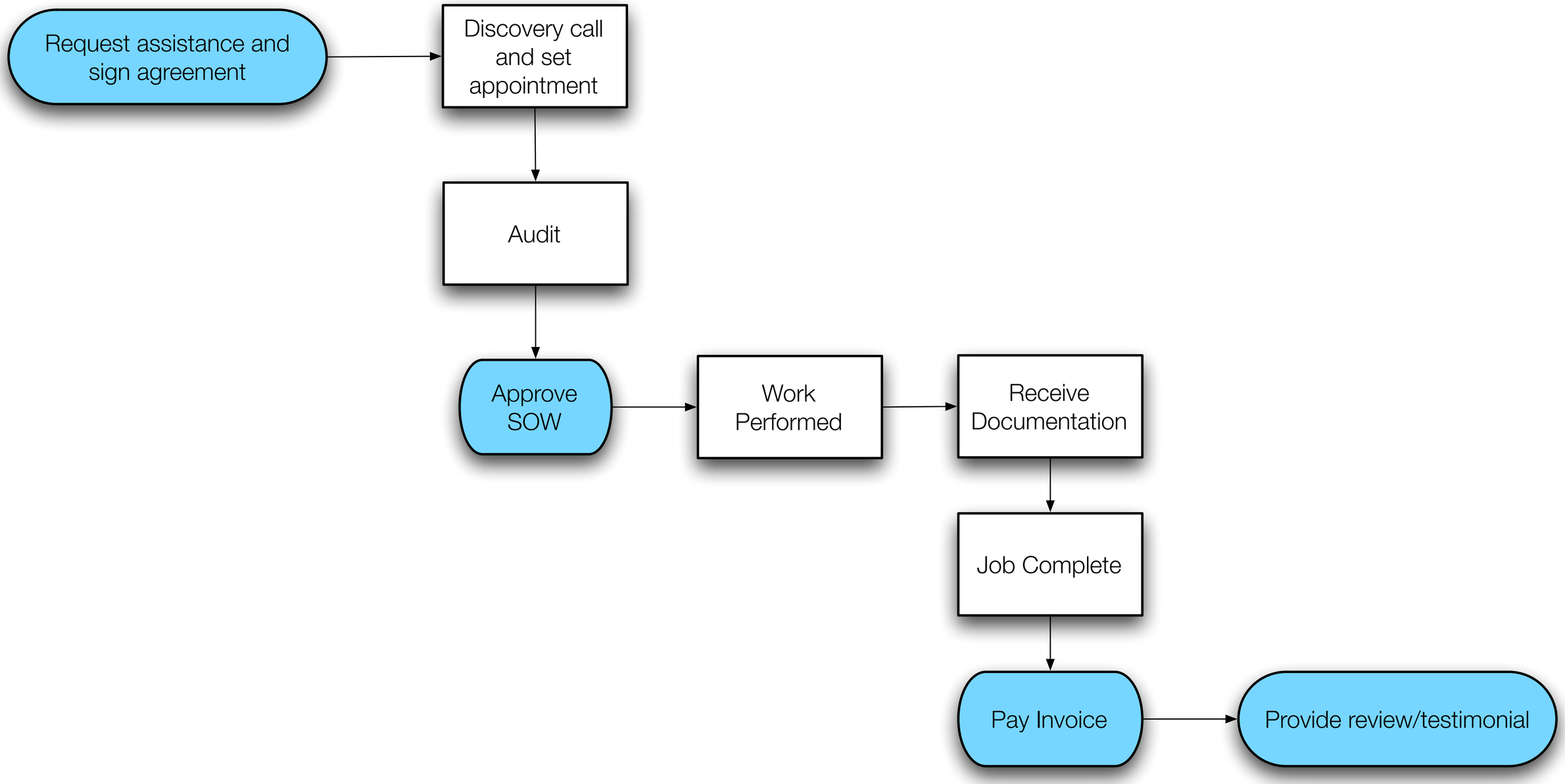
Define Your Process

- Introduction, ground rules, agreement
- Fact gathering, estimation and quoting
- Consensus on outcome of a successful session (SOW)
- Planning, arranging and executing the plan
- Documenting and finalizing the session
- Signing off

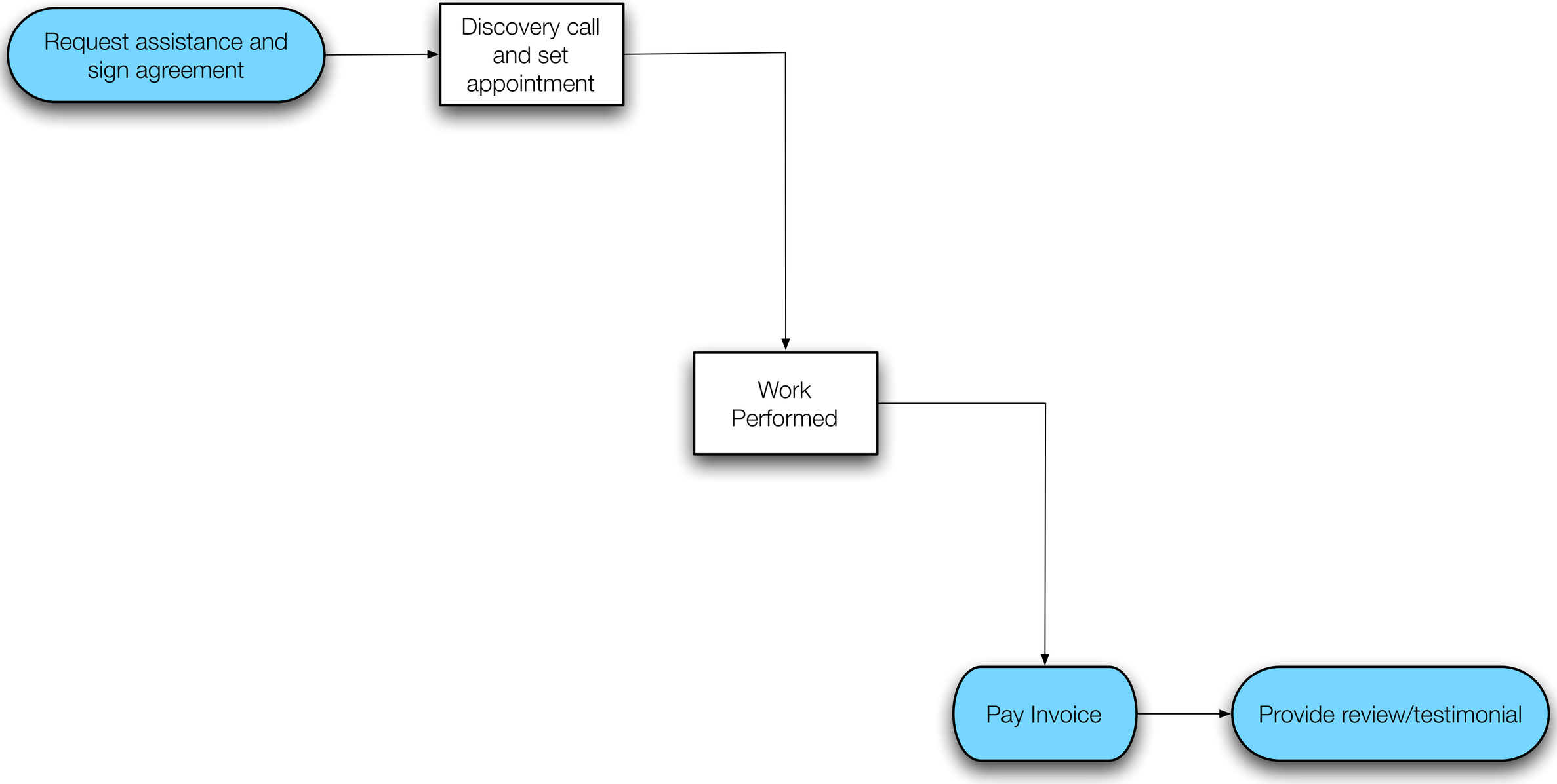
Internal Process



Client Process



Simple Client Process



Team

Luis Giraldo

President and Technical Director

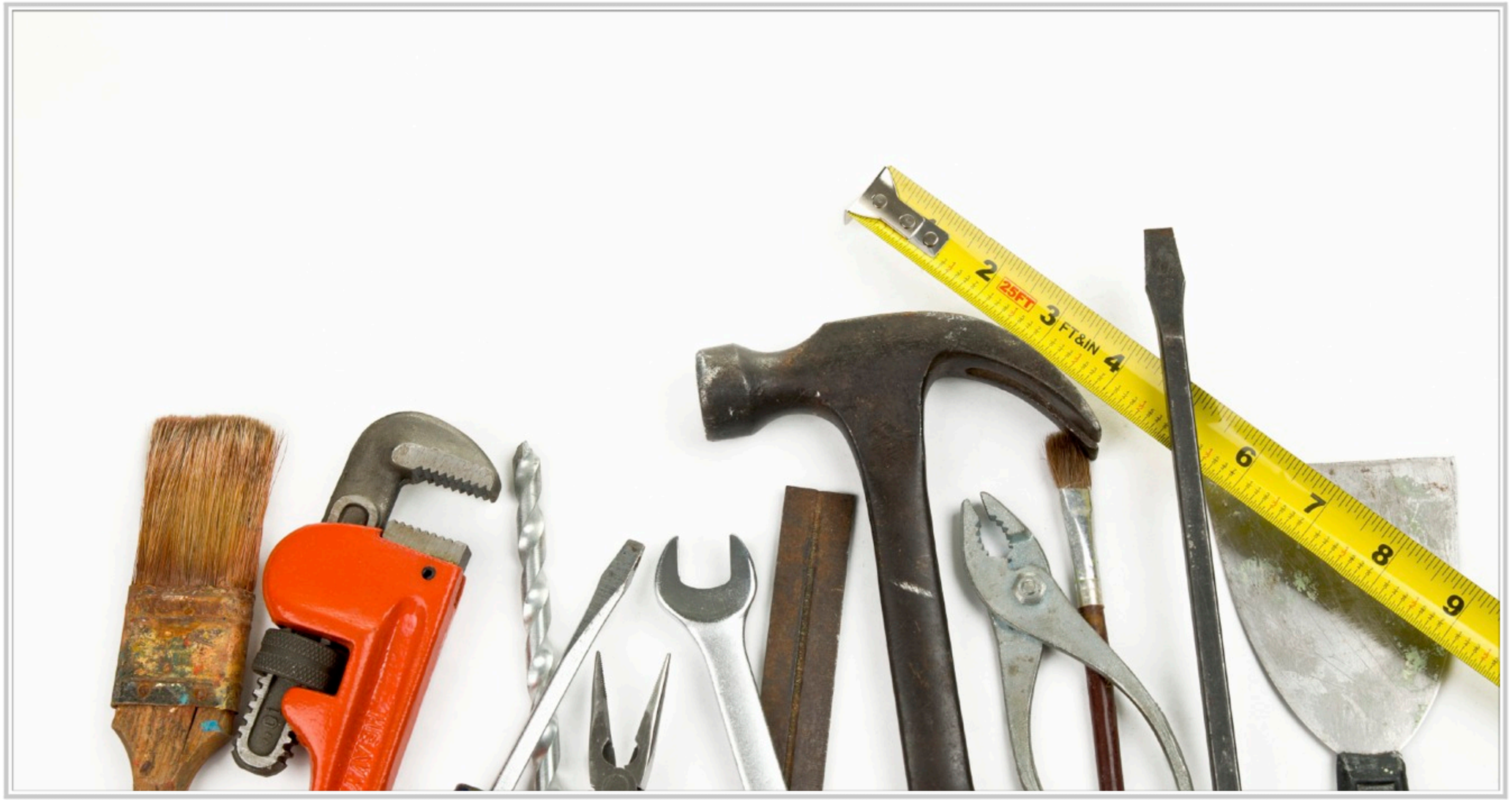
Certifications: ACSA (10.5, 10.6), ACT, CompTIA Network+

Zoe Maloney

Policy Enforcement

Introductions

- Get to know your client
- Let customers get to know you
  - Blog, video interview, "about me" page, etc.
- Transparency
- Phone manners!


25FT
FT&IN

Initial Contact

- Customer contacts you by form (Wufoo) or phone (RingCentral, Ruby)
- Customer signs agreement - EchoSign
- Send customer appointment options - Tungle
- Track customer information - Daylite

Remote Administration

- ARD
- Bomgar
- Copilot
- Crossloop
- GoToAssist
- GoToMeeting
- GoToMyPC
- iChat
- LogMeIn
- Mac HelpMate
- NTRGlobal
- SSH
- TeamViewer
- Timbuktu
- VNC
- WebEx
- Zoho Assist

list: www.monkeymac.com/mactech

Useful Apps/Services

- Casper Suite (MDM)
- Dropbox
- Evernote
- Freshbooks
- Mac HelpMate
- Mac OS X Server Wiki
- OmniFocus
- Pages/Word
- Teamly
- Watchman Monitoring
- WebHelpDesk
- ZenDesk

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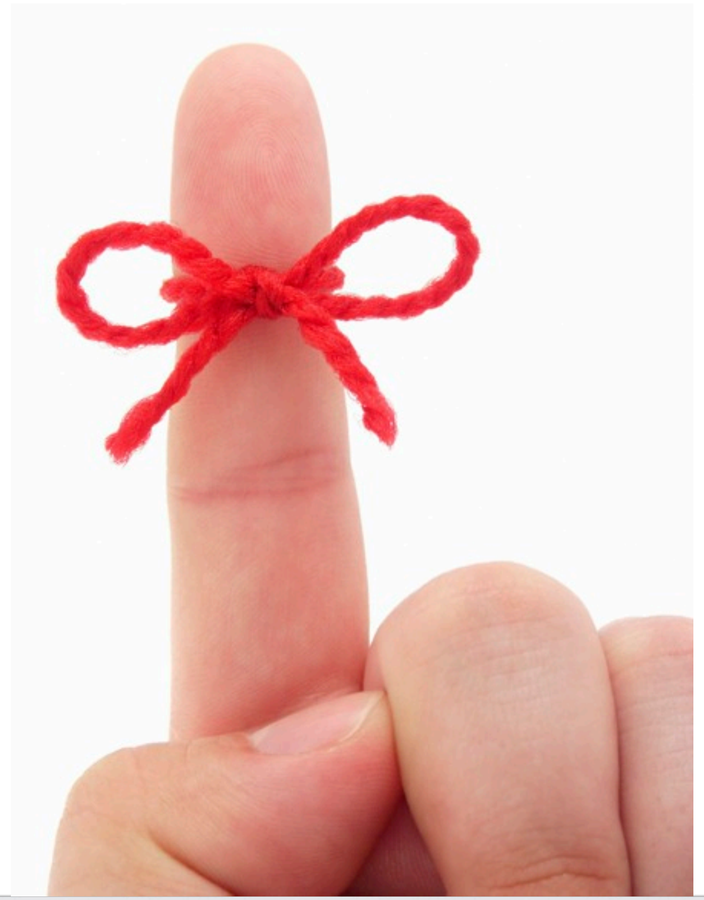
Driving Repeat Business

- Casper Suite (or other M/DM with reporting)
- Lithium
- Statekeeper (Mac HelpMate)
- Watchman Monitoring



Don't Forget

- It's our responsibility to educate
- It's our responsibility to manage expectations
- You reap what you sow
- Being human is messy

Q&A

monkeymac.com/mactech

Thank You