

HOW TO MAKE REMOTE CONSULTING WORK FOR YOU

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ME

- Juliet Glauber = MacGirl.DC
- MIT tech support until 2005
- Independent consultant
- Client size 5-20 users - varies widely



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WHAT'S REMOTE CONSULTING?

- Emergencies only
- Augment in-person support
- Primary service method



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REMOTE CONSULTING NEEDS A PLAN

- Work with your business plan
- Get time booked
- Bill the time
- Establish & maintain relationships with the humans



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REMOTE CONSULTING

➔ **PROS**



- When you can't get to them
- When they can't get to them
- Low cost of service delivery
- Recurring revenue stream

REMOTE CONSULTING

➔ **SUCKS**

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REMOTE CONSULTING

➔ **SUCKS** LOSING BUSINESS

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REMOTE CONSULTING

➔ **SUCKS** LOSING BUSINESS

- Forgotten
- Out of Loop
- Displaced

REMOTE CONSULTING

➔ **SUCKS TOO MUCH BUSINESS**



- Expectations of Eternal Availability
- Over-committed



SITUATIONS THAT WORK

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SITUATIONS THAT WORK



- Pre-configured hardware

SITUATIONS THAT WORK



- Pre-configured hardware
- Installing/configuring or demonstrating software

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- Pre-configured hardware
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- Providing support

SITUATIONS THAT WORK



- Pre-configured hardware
- Installing/configuring or demonstrating software
- Providing support
- Software-as-a-Service (SaaS) solutions



SITUATIONS THAT FRUSTRATE

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HANDS ON

- Plug / unplug
- Hardware failures
- Slow systems / networks

HUMANS



- Out of sight
 - ➡ out of their sight
 - ➡ out of your sight



HUMANS

- Out of sight
- Complex issues
 - ➡ First call = love
 - ➡ Third call = homicide

MAKE FUZZY STUFF CLEAR

- Fact gathering; estimation & quoting
- Signing on / Signing off

MAKE FUZZY STUFF CLEAR



Confirm
Your
Work !

REMOTE ADMIN CHOICES

- Apple Remote Desktop,
- Timbuktu
- VNC, SSH (port 22)



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ARD

- Remote Login and Remote Screen Sharing necessary for Apple Remote Desktop
- ARD uses ports 3283 & 5900

REMOTE ADMIN CHOICES



Logmein

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REMOTE ADMIN CHOICES



Logmein

- Gotomypc
- Gotoassist
- Teamviewer

REMOTE ADMIN CHOICES:

➔ ICHAT SCREEN SHARING

- Clients must grant access
 - ➔ Good & bad

REMOTE ADMIN CHOICES:

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- Easy to talk during session

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REMOTE ADMIN CHOICES:

➔ ICHAT SCREEN SHARING

- Clients grant access: good & bad
- Easy to talk during session
- More session interruptions.
- Unattended assistance impossible.
 - ➔ Can have firewall issues

USEFUL SERVICES

- Grasshopper:
get calls, voicemails & faxes
anywhere
- Evernote:
store/track notes
- EchoSign:
electronic signatures get
your contracts signed,
tracked and filed
- Tungle.me:
allow clients to schedule
your free time
- Daylite:
CRM/calendar. Similar to
defunct Now UTD



SERVICES THAT ARE USEFUL

- OmniFocus or Teamly:
prioritization & tasks
- JAMF(Casper)
Absolute Software
MacHelpMate:
Manage larger deployments
- WebHelpDesk, ZenDesk:
web-based help desks to
create/track tickets.
- OS X Server-Based Wiki:
built-in OS X server intranet
wiki



SERVICES YOU MUST PRY FROM MY COLD OFFSITE HANDS

Freshbooks:
online invoicing, time tracking



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SERVICES YOU MUST PRY FROM MY COLD OFFSITE HANDS

⇒ Freshbooks

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Home People Invoices Estimates Expenses Time Tracking Support Documents Re

Timesheet Projects Tasks Team Timesheets Generate Invoice

Timesheet

Monthly Weekly Daily **Start/Stop Timer**

<< < September 2011 > >>

Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Total
28	29	30	31	1	2	3	
				3.25	0.50	0.01	3.76
4	5	6	7	8	9	10	
0.01	0.25	0.01	0.01	0.01	0.01	0.01	0.31
11	12	13	14	15	16	17	
0.01	0.75	6.75	3.50	3.50	2.75		17.26
18	19	20	21	22	23	24	
		8.75	3.25	4.75	0.25		17.00
25	26	27	28	29	30	1	
		7.00			1.75		8.75
Total for September 2011:							47.08

* Select a day from the calendar to view more details.

Delete Forever Mark as Billed Mark as Unbilled

Project	Task	Notes
VeraDC	VeraDC-Additional...	-> misc IT: detailed hours for kCam.
VeraDC	VeraDC-Additional...	-> cleonard: backed up user's machine. Installed Office 2011 & updates. Configured user account. Investigated backup issue. Answered user questions.

Log Hours: September

Project: - select a project -

Task: - select a task -

Hours:

Notes:

Log Hours

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SERVICES YOU MUST PRY FROM MY COLD OFFSITE HANDS

- gCal
- Google Docs
 - ▶ Asset tracking
 - ▶ Master to-do list
 - ▶ Trouble tickets

TIPS

- Identify your human & communicate!
- Go onsite ... if possible. Some offices are more remote than others.
- Assemble and leverage a team
- Use cloud services to distribute files & installers, PPDs.

BE PROACTIVE WITH MONITORING: HAVE APPS SEND YOU MAIL

- Apple Remote Desktop
- SMART monitoring
- Retrospect
- Watchman
- FileMaker Server
- Server Admin in OS X Server