

# How to Make Remote Consulting Work for You

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# Pros

- Cost - You can keep your costs down.
- Time - You can assist a client much quicker or at least triage
- Help - You can help them wherever you are physically located
- Revenue - Creating revenue when possibly no revenue would be generated.

# Cons

- Presence - You do not have a face to face relationship with the client.
- Expectations - Clients expect that you will ALWAYS be available
- Triage - Attempting to fix something remotely that should have been addressed on site.

# How to overcome these?

- Presence - Schedule a quarterly onsite meeting with them. Discuss future plans, needs, as well as complete some preventative maintenance.
- Expectations - Set these ahead of time with the client so they know up front your guaranteed response time. Try your best to stick to it.

# How to overcome these?

- Triage - Get as descriptive as possible with the client.
- Triage - Go into it with as much of an understanding as possible.
- Planning - Make sure your time permits to work on it till its resolved.

# When is remote work not applicable?

- Hardware faults
- Tasks that require “hands off keyboard”
- Bare metal rebuild, unless part of a proper plan
- A repeat issue (Customer Service)
- “Well, just have a quick look. Do what you can”

# Things to ask yourself

- When and how will calls get booked and invoiced?
- What are you trying to accomplish?
- In what ways might it hinder success?
- How will you measure success?

# Things you should have in place

- Agreements with the customer
- Retainer or managed services agreement
- Expectations
- Knowledge of the client



# Things you should have in place

- VPN access
- Proper knowledge of their infrastructure
- Plan B

# Tools for Remote Admin

- Apple Remote Desktop
- Mac HelpMate
- Logmein
- iStat Server
- VNC
- SSH

# Apple Remote Desktop

- Organization
  - Asset management
- Reporting
  - Hardware
  - Software
  - Device

# Apple Remote Desktop

- Software Installation
  - Packages
  - File Copy
- Remote Administration
  - Observe multiple machines at once
  - Reboot or shutdown

# Apple Remote Desktop

- Remote Administration
  - Send unix commands to one or many machines
  - Rename Computers
  - Launch Applications
  - Empty the trash

# ARD Planning

- Organize Groups
  - Organize them by company or site
- Make sure firewall has ports opened (If needed)
  - Ports 3283 and 5900
- Store usernames and passwords

# No matter which solution

- Make sure you know it well
- It does what you need
- Keep it clean and organized

# Mac Helpmate

- Zero interaction rollout
- Widget for one click sharing
- Custom branding to reinforce your company
- 200 tools for diagnostic and troubleshooting
- Advanced monitoring and alerts



# iStat Server

- Provides useful stats on the fly
- Installs as a widget (Free)
- iOS app costs \$.99
- Uses port 5109

# Logmein

- Great for when client is out of town
- Control without any previous setup
- Works well in low bandwidth situations

# Training Clients

- Make sure they know how to contact you
- Setup a ticketing system
- Make sure they understand how your system works
- Create a support@yourdomain.com

# Useful Services

- Grasshopper - Telephone Presence
- Evernote - Keep things organized
- EchoSign - Sign PDF Documents
- Freshbooks - Invoicing and Billing
- OS X Server Wiki

# Useful Services

- Google Voice - Communications, Cut down on phone costs

# Internet on the go

- 4g Mobile hotspots
- 3g Mobile hotspot
- iPhone tethering
- DO NOT plan on using internet that is out of your control

# Files

- Keep normal tools and applications in a service like dropbox
- Keep everything on your machine as organized as possible for efficiency
- Make disk images of common installs (Office 2011, Adobe CS5)

# Billing/Documentation

- Important to keep track of billable hours
- Keep track of everything you have done
- Provide a client with a detailed summary of support session
- If it was not resolved make note of resolution steps



# Working Conditions

- Quiet space to work in
- Sufficient internet
- Make sure to plan breaks

# Ticketing System

- Clients can access directly
- Clients can check status, add notes and relevant information
- Organize your schedule
- Keep track of information and time

# Closing Thoughts

- Know your customer and their needs
- Try and keep up with where they are going as a company
- Keep everything organized
- Only you know what works best for you and do not hesitate to try different things

# Closing Thoughts

- Keep your equipment maintained
- Know the people in your network and build a relationship with them.
- Keep a log of common problems that you encounter and document resolutions (Wiki or Evernote)

# Closing Thoughts

- Keep the customer informed on status
- Don't overstretch yourself
- Monitoring - Know the have a problem before they do

Q & A