

How to Make Remote Consulting Work for You

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MACTECH

“I design, develop and support technologies the improve access of information for millions of people.”



diegocardenas.com

Who am I?

- Technologist by trade
- 1980's - Started career in Tech, Created 1st business, Showcased on National and International publications.
- 2000's - Continued in Tech, founding member of cdstomper.com. eBay titanium seller in video games category.
- Today - Boutique consulting to SMBs, on technology. "I design, develop and support technologies the improve access of information for millions of people."



Customers and Other Consultants

- Positioning as expert in an area
 - Blogs, Personal Website, Forums, Social Media, Twitter, Facebook.
 - Use Google Alerts for research on Expertise Area.
 - Post your knowledge in Forums
- Become a Trustworthy service partner



Where Does Remote Consulting Fit?

- Services - KPO Know it use it to your advantage!
If Fortune 500 use it. It can be used at a small scale.
- Accomplish - Why do you offer remote consulting to your clients?
- Measure success - How will you measure success?
- Will remote consulting help? How will RC help you achieve consulting success?
- Hinder success? Will remote consulting be good for your business?



Remote Consulting Pros

- Service Delivery - Virtually Anywhere
- Assist Remote Clients - No matter Location
- Low Cost of service delivery
- Revenue Stream - Recurring



Remote Consulting Cons

- Risk of being forgotten - Out of sight out of mind
- Availability Expectations - Clients will develop expectations
- Risk of over-committing - Don't promise too much and fail to deliver
- Risk of being displaced - No human contact can lead displacement.

Remote Consulting Can be a Great Addition

- Plan and Manage the delivery and experience - Do not promise immediate support.
- Services - Not all services can be done via remote support will work
- Calls get booked - If billing for support then keep track of call stats for billing. Make sure client knows how you will bill the remote support.
- Establish and maintain - Call clients, be proactive do not have them call when they need your services.



Situations and Services

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



Situations That Don't Lend Themselves

- Tasks that require 'hands to leave the keyboard'
- Bare metal rebuilds - Complete System Restores.
- Plug/unplug, hardware-dependent - You are not there don't ask client to do this for you.
- "Well, just have a quick look. Do what you can." - If you know there is no solution remotely.
- 2nd call; 3rd call - Make arrangements on going to site.



Tools for Remote Consulting

- Introductions; fact gathering; estimation & quoting
 - Get the facts, don't make assumptions.
 - Accurate estimates and quote of the work or projects to be done.
 - Clearly Articulate and present the quote or SOF (Statement Of Work)
- Signing on
 - Client will have the buy into your plan and will help you execute.

Tools for Remote Consulting

- Planning, arranging and executing your plan/recipe
 - Give the client a clear and simple idea of how you plan to execute.
- Confirmation of achievements
 - Every time you reach significant milestones notify client with progress reports.
 - Keep the client in the loop.
- Signing off

Remote Admin Choices

- Apple Remote Desktop, Timbuktu, VNC, SSH
- Gotomypc, Gotoassist, Logmein, Teamviewer, Google Remote Desktop App on Chrome
- iChat Screen Sharing - Pros and Cons



Services That are Useful

- Grasshopper - Virtual PBX
- Evernote - Evernote makes it easy to remember things big and small from your everyday life using your computer, phone, tablet and the web.
- EchoSign - Secure signature of PDF docs.
- Tungle.me - Tungle.me makes scheduling meetings easy—across organizations, calendar systems, and time zones. It eliminates costly double bookings, frustrating time zone mishaps, and the endless back and forth emails and phone calls of finding a time to meet. EOL
- Daylite - Daylite keeps everything related to your business in one place. This makes it easy to find things, easy to add new things, and easy for everyone you work with to be on the same page.
- Freshbooks - Online invoicing and project billing.
- Pages or Word - Word Processing and basic DTP



Services That are Useful

- OmniFocus or Teamly - OmniFocus is designed to quickly capture your thoughts and allow you to store, manage, and process them into actionable to-do items.
- JAMF, Absolute Software - The Casper Suite simplifies the life of system administrators with a comprehensive platform to manage Mac OS X computers and iOS mobile devices.
- WebHelpDesk - is a web-based, help desk software used for tracking support requests for enterprises and educational institutions.
- MacHelpMate - is an application which wraps numerous free open source command line utilities in a user interface for ease of use amongst those unfamiliar with command line tools. Its primary function is remote screen sharing, and it is marketed almost exclusively to IT Pros and those who support Apple Computers professionally.
- Apple Remote Desktop - Apple Remote Desktop is the best way to manage the Mac computers on your network. Distribute software, provide real-time online help to end users, create detailed software and hardware reports, and automate routine management tasks — all without leaving your desk.
- Zendesk.com - Zendesk is a SaaS-based customer support/help desk product. Its features include email ticket tracking, providing a customer self service portal, and general help desk reporting and tracking.



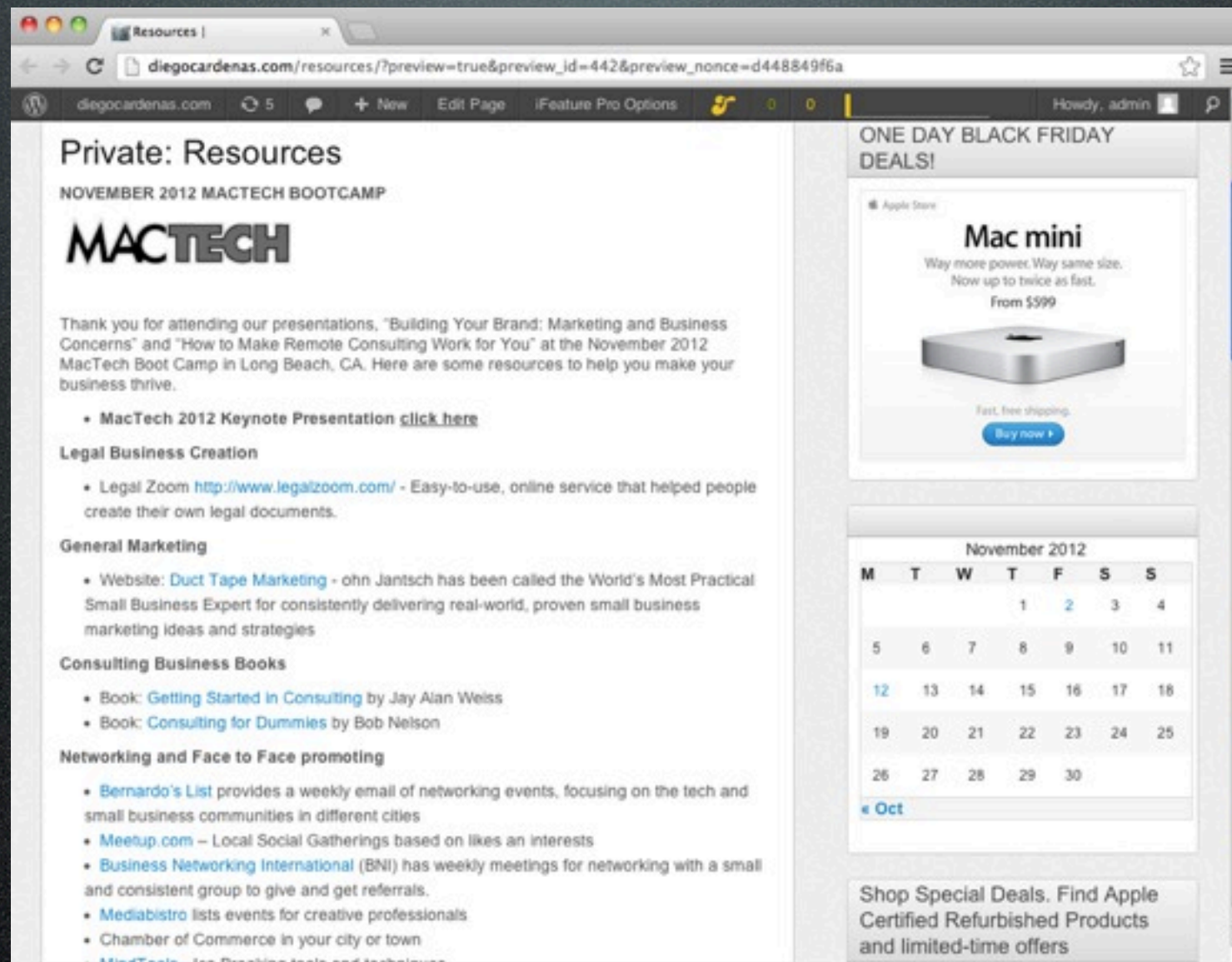
Tips

- Remote notification - To drive repeat business.
- Qualify and plan - Plan when to visit and when to not visit client sites.
- Go onsite once in a while do not only rely on remote support.
- Assemble and leverage a network - Build a team of co-workers, contractors in case you can't make an appointment.



Great List of Resources

- <http://www.diegocardenas.com/resources>



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Survey/Contact Me:

Many More Resources:

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ask any questions or just to say hi!*

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