

# MAKING WORKFLOWS WORK

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From “Hey, this isn’t working...” to “Sweet, we got a check in the mail.” and everything in between.

# ABOUT ME

- 34 years of Apple experience.
- Was a one man shop for first 7 years of business.
- I love to tell stories.

# ABOUT HOOSIERMAC

- Been in business 10+ years
- We are a Business Consultancy focusing on technological solutions for small businesses and schools.

# IT WORKFLOW EXAMPLE

- Machine develops issue
- Customer notifies us there is a problem.....eventually
- Technician is deployed to fix issue
- Issue is resolved
- Customer is presented invoice for fixing
- Customer pays invoice (may take a while)



# MSP WORKFLOW EXAMPLE

- Machine has issue
- We are notified automatically
- Technician is deployed to fix the issue
- Issue is resolved
- Payment is processed



# THE MONEY STUFF

Which do you like?

# FIRST SPEED BUMP

- Customer notification of issue.
  - They are almost always humans and always busy
  - Do they even know WHO to contact?
  - Authorization for repair
  - FINALLY contact is made





# SECOND SPEED BUMP

- What happens when customer reports issue?
  - Make a ticket
  - Logging work
  - Customer tracking
  - Work verification by customer





# THIRD SPEED BUMP (THE WORST ONE)

- Getting paid.
- Getting service ticket into invoice.
- Getting invoice to customer
- Receiving \$\$\$ from customer.



# DO YOU HAVE THE TOOLS?

- Automation is beautiful
- Efficient processes
- Will make your work easier

# DO YOU HAVE THE RIGHT TOOLS?

- Does your customer know how to create a ticket?
- Are you quickly able to discern who gets assigned the ticket?
- Are you able to act on tickets quickly?
- Are you able to close tickets quickly?
- Is it easy to go from a ticket to an invoice?
- How do you get paid?
- Can your bookkeeper make sense of what you did?

# OUR TOOLS

- ConnectWise
- Kerio Connect/Samepage
- TeamViewer
- ConnectBooster
- Watchman Monitoring
- GFI Max RMM
- Slack
- Bitrix24 - Evaluating at this stage
- FileWave
- Quickbooks
- Tinderbox
- Dropbox
- Synology CloudStation
- PRTG
- Gruntwork - Evaluating at this stage
- CrashPlan



# BUT I'M AFRAID OF CHANGE

- Don't stay with bad processes/tools simply because you are used to them
- Evolve or close shop eventually
- Fully vet a solution before implementing

IT SEEMS LIKE I'M ALWAYS  
TWEAKING OUR PROCESSES

- Yep

WHAT'S THE MOST IMPORTANT THING I  
SHOULD TAKE FROM THIS  
PRESENTATION?

- PROCESS IS  
KING

WAIT A MINUTE, I'M A  
BUSINESS OWNER NOW

- Yep.



# THINGS I WISH I KNEW BEFORE I DID THIS

- Good processes will make you so much more efficient you can take on more clients and make more money.
- There are a LOT of tools out there.
- Be social about your issues and find people who are in the similar situation as you are.
- Customers aren't afraid of spending more money IF they see the value of what you are offering.

DISCUSSION TIME