

# Peter Linde Linde Group, Inc.

Peter Linde started consulting in late 1989, helping friends of friends to computerize their landscape architecture office. Through mostly dumb luck, he hired some great people and today, his company is growing past 30 employees. Linde Group's clients include the largest companies in the "sharing economy," the fastest growing social network, and the largest installed base of Macs on the planet. In 2014, his employees refused job offers from Uber, Pinterest, Apple, and many others. Oh - and Linde Group is hiring!

## He doesn't know these people—>



Managing Your Clients  
To Increase Productivity and  
to Optimize Revenue  
aka: Things I Wish I'd Known

# Who are you?

- How many are solo practitioners? How many of you solo practitioners want to add employees?
- How many of you have businesses with employees - more than just you?
- How many of you work on a Time & Materials basis?
- How many charge a flat fee/month or per user?
- How many of you have a source of recurring revenue?

# Manage your Clients to Increase your Productivity & Optimize Revenue

- These are three tangentially-related topics.

# Managing Your Clients

- Managing clients IS managing your income.
- Clear communication - from sale to performance to invoice.
- Every invoice tells a story.
- Documentation costs money.
- Documentation doesn't cost money. It makes money.
- There are a million tools - find the ones that work for you. Links at the end.

# Manage Clients by Managing Yourself

- Know who you are.
- Know who you are not!

# Things You Should Know About You

- What's my service area?
- What size client do I work with?
- What are my rates?
- What are my hours of availability?
- What technologies do I support?
- What kind of work do I want to do?

# Filter Like Hell

Send the wrong clients to  
someone else.

# Optimize Your Revenue (and Your Happiness)

Work with the clients you want, doing the work you know and love, for the rate(s) you want to charge.  
Period.

Let's get Specific

RAISE YOUR

G\*DDAMN RATES!

**BILL! SEND INVOICES!**  
**Get a system, get a bookkeeper,**  
**whatever - just BILL!**

Do what you're good at -  
outsource the rest.

Keep (and mine) the  
clients you have.

# Don't. Screw. Up. (unless you can't avoid it)

- Don't work without a net.
- Take a big-picture view of how to save them money.
- Stop saying “No” for your clients.
- Introduce them to concepts like “fault tolerance,” “high-availability,” and “auto-failover.” And make them pay for them - because they benefit you both.
- Slices of Swiss Cheese
- Study your emergencies & failures for trends.

# Let's Talk about "Productivity"

Know your levers:  
Speed, Price, Quality:  
Pick Two

# Options for More Dollars

- Raise your rates.
- Efficiency: spend less time on things you're already doing. (Standards/Process/Procedures)
- Recurring Revenue: sell once, reap many.
- Get employees.

# Organizational and best practices

- Sharpen the saw.
- Processes & Procedures - Make 'em. Live 'em. Sell 'em.
- Create a documentation template & use it!
- Keep great notes.
- Document the crap out of everything you touch.
- Client Calendar.
- Make EVERYTHING redundant.

# Ways to generate revenue

- Remote system monitoring (RMM)
- Security services such as spam filtering
- Hosted services (Office 365)
- Other non-competitive service partners
- Affiliate programs for software and hardware
- Software that you like and already recommend
- Apple Consultant Network: Business Affiliates program

# Resources to Explore

- [consultants.apple.com](http://consultants.apple.com)
- [www.macbrained.org](http://www.macbrained.org)
- [www.zendesk.com](http://www.zendesk.com)
- [www.helpscout.com](http://www.helpscout.com)
- [www.expensify.com](http://www.expensify.com)
- [www.connectwise.com](http://www.connectwise.com)
- [www.autotask.com](http://www.autotask.com)
- [www.spiceworks.com](http://www.spiceworks.com)
- [www.webhelpdesk.com](http://www.webhelpdesk.com)
- [www.watchman.com](http://www.watchman.com)
- [www.labtech.com](http://www.labtech.com)
- [www.kaseya.com](http://www.kaseya.com)
- Google: IT Documentation Template

# Resources to Explore

- [www.macenterprise.org](http://www.macenterprise.org)
- [www.freshdesk.com](http://www.freshdesk.com)
- [agilebits.com](http://agilebits.com)  
(1Password)
- [www.thycotic.com](http://www.thycotic.com)  
(Secret Server)
- Munki, Chef, AutoPKGR
- Casper/Bushel
- E-Myth by Gerber
- 7 Habits by Covey
- [openradar.appspot.com/  
page/1](http://openradar.appspot.com/page/1)
- irc: ##osx-server
- Local Small Business Administration Office

# Questions?

Peter Linde  
[peter@lindegroupp.com](mailto:peter@lindegroupp.com)

The Linde Group logo features the text "Linde Group" in white, centered within a teal-colored, pixelated rectangular shape. The background of the slide is dark with a fine, repeating pattern of small teal squares.

Linde Group

Technology ■ Strategy ■ Integrity