

MANAGING YOUR CLIENTS TO INCREASE PRODUCTIVITY AND OPTIMIZE REVENUE AKA: THINGS I WISH I'D KNOWN

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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

- 35 years of Apple experience.
- Was a one man shop for first 7 years of business.
- I love to tell stories.
- Happily married for 15 years with three children.
- I own a **Gold MacBook**.

ABOUT *MY IT INDY*

- In business for 11+ years.
- We are a consulting group focusing on Apple technology solutions for small businesses and schools.
- As of Aug 1st we will no longer service non-contract business clients.

ABOUT **YOU**

RAISE YOUR HAND IF...

- You bill T&M Projects...
- You only work when the phone rings...
- You feel like you are constantly put out fires...
- You want to learn a better way...
- You have an Apple Watch...

IT WORKFLOW EXAMPLE

- Machine develops issue
- Customer notifies consultant there is a problem.....eventually
- Technician is deployed to fix issue
- Issue is resolved
- Customer is presented invoice for fixing
- Customer pays invoice ... eventually



THE MONEY STUFF

Which graph do you prefer?

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



MSP WORKFLOW EXAMPLE

- Machine develops an issue
- Consultant is notified automatically
- Technician is deployed to fix the issue or the issue is managed remotely
- Issue is resolved
- Payment is processed (or not needed)

WHY AUTOMATE?

- Automation is beautiful
- Efficient processes
- Will make your work easier
- Will get you more customers

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?
- Do you market?

OUR TOOLS

- ConnectWise
- Kerio Connect/Samepage
- Simple-Help
- ConnectBooster
- Watchman Monitoring
- GFI Max RMM
- Slack
- FileWave
- Quickbooks
- Quotewerks
- Soonr
- Meraki
- PRTG
- Gruntwork
- CrashPlan
- Google Apps/Exchange

“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

_____ IS KING.

- PROCESS

“WAIT A MINUTE, I’M A BUSINESS OWNER NOW”

- Yep

THINGS I WISH I'D KNOWN

- Good processes will make you so much more efficient - you can take on more clients and make more money.
- There are **A LOT** of bad tools out there.
- Collaborate about your issues and find people who are in similar situations as you.
- Customers aren't afraid of spending more money IF they see the value of what you are offering. You also have to believe in the value of what you are offering.

DISCUSSION/Q & A

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