

Joshua Carlson

Josh Carlson has worked in the IT field for nearly 13 years. He is currently the Director of Technology at Ascension Episcopal School in Lafayette, LA where he has implemented a revolutionary iPad 1:1 program. The technology program at Ascension Episcopal School was recently named an Apple Distinguished Technology School, one of about 50 in the nation.

Josh is also the VP of Sales for Rooted Consulting, a consulting company serving clients all along the Gulf Coast.

Josh is an Apple Certified Technical Coordinator as well as a Certified Ethical Hacker.



Managing Your Clients To Increase Productivity and To Optimize Revenue

What About You?

- How many of you are one-man shops?
- How many of you have multiple consultants?

Speaking From Experience

- One-man shop for 5 years
- Now, part of an organization with multiple consultants & office staff

Learn From My Mistakes

- My company did great for many years
- I kept all information stored securely...in my head
- This limited my potential to grow and ultimately limited my profits
- Lack of organization led to me closing my company

Why Should I Grow?

Why Should I Grow?

- Our first job is to coach and mentor
- We cannot do this if we are not organized or if everything we “know” is in our head

How Do I Grow?



Document Everything

- If it isn't written down, it doesn't exist
- Communicate and sign SLA before doing anything
- Process to onboard new clients
 - Network Audit
 - IP Addresses
 - Servers
 - Username/Password
 - Etc.

Document Everything

- Ticketing System/Work Orders
- Onsite Notes
 - Client notes
 - Consultant notes

Communication with Clients

- When clients are paying a premium, they shouldn't have to wonder what work has been done
- Onsite notes are just as important for the client as they are for the consultant
- Communicate:
 - What has been done
 - What you recommend
 - Discounts given

Financial

- Bill clients regularly...As in daily
- Clients don't remember what you did three weeks ago, just like you don't remember
- Daily and Weekly reports within Quickbooks are key
- Signing an SLA is critical for both parties

Tools Are Your Friend

- Zendesk
- Watchman
- Daylite
- Quickbooks Online
- Slack
- Google Apps for Business
- MDM

Ways to Generate Revenue

- Retainer Clients
- Proactive Network Monitoring
- Reseller Programs
- Expand Current Services
- Apple Consultant Network
- Network

You Select Clients

- You decide who/who isn't going to be one of your clients
- You don't have to take every job and every client
- The relationship should be mutually beneficial
- Charge a premium, don't price yourself out of the market

More Resources

- watchman.com
- zendesk.com
- quickbooks.com
- marketcircle.com/daylite
- consultants.apple.com
- slack.com

Questions?



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