

Will O'Neal

Will has been around small business IT for his 25 years in the "real world" career. He's been dealing with Macs for more than 20 years, and he worked for a couple of other small Mac shops before starting Mid-Atlantic Computer Solutions in late 2002. Many of his customers date back to the late 90's as they have followed him from place to place.



MANAGING YOUR CLIENTS

BY PUTTING YOUR BUSINESS FIRST

**I AM WILL
O'NEAL**

MID-ATLANTIC
COMPUTER
SOLUTIONS





Mid-Atlantic
Computer Solutions
Managed Services for Mac

WHY ARE WE DOING THIS?

- Too few consultants understand what customers actually need
- Even consultants who understand a customers needs don't know how to deliver them

WHAT DOES THAT MEAN?

- IT Support
- and
- and
- and

SO NOW YOU KNOW WHAT THE CUSTOMER NEEDS

- You need some tools:
 - You need a method of documentation
 - You need a method of communication
 - You need a method of standardization
 - You need a way to invoice customers and get paid
 - to be continued...

**IF YOU AREN'T WORKING ON
YOUR BUSINESS**

YOU ARE WORKING IN YOUR BUSINESS

**AND WORKING IN YOUR
BUSINESS**

IS CALLED HAVING A JOB

SO WE ARE GOING TO ASSUME

- That you do this professionally
- That you intend to do it until you can sell it or you want to retire
- That you want to have a business at the end of days that's worth more than \$1

HERES THE THING

- No limits
- You need organic growth
- Don't die

WHAT THAT MEANS

- If you aren't working ON your business
 - Increasing revenues
 - Additional services
 - Sell the entire suite of IT services

THEN

- Marketing Dollars work
- And those marketers will take your customers away from you

AND

- Limits suck, especially in a fast paced environment
- If you aren't increasing your suite of solutions, remember they have eyes and ears and they see what others are offering.

I CAN PROMISE YOU

- That your small business customer feels the same way about his business as you should towards yours
 - He will act in the best interest of his needs
 - and not in your best interest.
 - I don't care how many barbecues, ball games, or Friday night boozefests you went to with him

WHY?

- Did the customer hire you?
 - What did they need?
 - Was there a lack of choice?
 - Did you "sell" yourself?
 - Or did you "sell" your potential?

WHAT AM I TALKING ABOUT?

WHAT YOU PROVIDE NOW

- Mac support
- ?
- ?
- ?
- ?
- ?

WHAT YOU SHOULD PROVIDE

- High margin services that give you recurring commissions:
 - Managed services - not the same thing as flat rate
 - VOIP Services
 - Cloud based services
 - Web Hosting
 - Email hosting / spam filtering / message archiving
 - DNS hosting
 - End user training
 - Application training / app suggestions
 - Policy management
 - COMPLETE "THE BUSINESS OF IT" LEVEL SERVICES

WHAT ARE MANAGED SERVICES

- Is it just unlimited support?

MANAGED SERVICES ARE

- Imagine one of your customers hires a CIO
 - note, I didn't say IT guy
- You need to act as the CIO for your customers
 - That means you take ownership of everything IT related for the customer

REQUIRED TOOLS

- Simple CRM or Calendaring system

REQUIRED TOOLS

- Ticketing system

REQUIRED TOOLS

- Inventory Management

REQUIRED TOOLS

- Feedback system

REQUIRED TOOLS

- Automated billing system

REQUIRED TOOLS

- Documentation system

REQUIRED TOOLS

- Automated update tool

REQUIRED TOOLS

- Quoting tool

REQUIRED TOOLS

- Team communications tool - NOT email!

REQUIRED TOOLS

- Project Management

REQUIRED TOOLS

- Cloud File Sharing

REQUIRED TOOLS

- Process standardization tool

REQUIRED TOOLS

- PSA

WHERE DID I START

- Hired a business coach
- Hired a professional services organization

REMEMBER

- This stuff costs money
- Your fees must be high enough to cover your expenses
- If you are winning customers because you are cheaper than someone else, you aren't winning

SERVICES I RESELL

- Above and beyond “IT Support or Managed Services”
 - **DNS hosting**
 - Web Hosting
 - Email Hosting/Spam Filtering/Message Archiving
 - Cloud file services
- Offsite backup
- Mobile Device Management
- Software licenses
- SSL Certificates
- Email migrations
- Google Apps
- Website building

SERVICES I RESELL

- Above and beyond “IT Support or Managed Services”
 - DNS hosting
 - **Web Hosting**
 - Email Hosting/Spam Filtering/Message Archiving
 - Cloud file services
- Offsite backup
- Mobile Device Management
- Software licenses
- SSL Certificates
- Email migrations
- Google Apps
- Website building

SERVICES I RESELL

- Above and beyond "IT Support or Managed Services"
 - DNS hosting
 - Web Hosting
 - Email Hosting/Spam Filtering/Message Archiving
 - Cloud file services
- Offsite backup
- Mobile Device Management
- Software licenses
- SSL Certificates
- Email migrations
- Google Apps
- Website building

SERVICES I RESELL

- Above and beyond “IT Support or Managed Services”
 - DNS hosting
 - Web Hosting
 - Email Hosting/Spam Filtering/Message Archiving
 - Cloud file services
- Offsite backup
- Mobile Device Management
- Software licenses
- SSL Certificates
- Email migrations
- Google Apps
- Website building

SERVICES I RESELL

- Above and beyond "IT Support or Managed Services"
 - DNS hosting
 - Web Hosting
 - Email Hosting/Spam Filtering/Message Archiving
 - Cloud file services
- Offsite backup
- Mobile Device Management
- Software licenses
- SSL Certificates
- Email migrations
- Google Apps
- Website building

SERVICES I RESELL

- Above and beyond "IT Support or Managed Services"
 - DNS hosting
 - Web Hosting
 - Email Hosting/Spam Filtering/Message Archiving
 - Cloud file services
- Offsite backup
- **Mobile Device Management**
- Software licenses
- SSL Certificates
- Email migrations
- Google Apps
- Website building

SERVICES I RESELL

- Above and beyond "IT Support or Managed Services"
 - DNS hosting
 - Web Hosting
 - Email Hosting/Spam Filtering/Message Archiving
 - Cloud file services
- Offsite backup
- Mobile Device Management
- **Software licenses**
- SSL Certificates
- Email migrations
- Google Apps
- Website building

SERVICES I RESELL

- Above and beyond "IT Support or Managed Services"
 - DNS hosting
 - Web Hosting
 - Email Hosting/Spam Filtering/Message Archiving
 - Cloud file services
 - Offsite backup
 - Mobile Device Management
 - Software licenses
 - **SSL Certificates**
 - Email migrations
 - Google Apps
 - Website building

SERVICES I RESELL

- Above and beyond "IT Support or Managed Services"
 - DNS hosting
 - Web Hosting
 - Email Hosting/Spam Filtering/Message Archiving
 - Cloud file services
- Offsite backup
- Mobile Device Management
- Software licenses
- SSL Certificates
- **Email migrations**
- Google Apps
- Website building

SERVICES I RESELL

- Above and beyond "IT Support or Managed Services"
 - DNS hosting
 - Web Hosting
 - Email Hosting/Spam Filtering/Message Archiving
 - Cloud file services
- Offsite backup
- Mobile Device Management
- Software licenses
- SSL Certificates
- Email migrations
- **Google Apps**
- Website building

SERVICES I RESELL

- Above and beyond "IT Support or Managed Services"
 - DNS hosting
 - Web Hosting
 - Email Hosting/Spam Filtering/Message Archiving
 - Cloud file services
 - Offsite backup
 - Mobile Device Management
 - Software licenses
 - SSL Certificates
 - Email migrations
 - Google Apps
 - Website building

SERVICES THAT PAY ME COMMISSION

- That you might not be thinking about
 - Office365
 - VOIP Services
 - Cloud services that do not sell direct

WHY MANAGED SERVICES?

- Improve security
- Become proactive
- Provide better uptime
- Guide customers towards new solutions
- It is cheaper than internal IT

WHY, PART 2

- Gives customer piece of mind
- Frees their staff to focus on actually why the business hired that person
- Cloud is here, now, and it's not going away.
- Frees their budget to hire people who do what their business does best
- Now that things are managed professionally, in the cloud, you don't have to work as hard

HOW WE DO THINGS DIFFERENTLY

- We understand what the customer has prior to on boarding - we survey their environment so there are no surprises
- The customer understands where they currently stand vs where they should be standing when it comes to IT services



Hardware



Backup and Disaster Recovery



Network Security



Wireless Access



Environmental



Domain & DNS Security



End User Training & Policies

- ▼ **S** Hardware
 - ▶ **C** Servers & Storage
- ▼ **C** Desktops & Laptops
 - ▶ **Q** Up to date
- ▼ **C** Network Firewall
 - ▶ **Q** Capabilities
 - ▶ **Q** Filtering
- ▼ **C** Wireless Access
 - ▶ **Q** Up to date
 - ▶ **Q** Capabilities
- ▼ **C** Network Switch
 - ▶ **Q** Are there enough switch ports
 - ▶ **Q** Up to date
 - ▶ **Q** Are the switches Gigabit capa
- ▼ **C** Wiring
 - ▶ **Q** Is the network wiring "in code
 - ▶ **Q** Is the network wiring Categor
- ▼ **S** Backup and Disaster Recovery
 - ▼ **C** Server Backup
 - ▶ **Q** Backup Documentation
 - ▶ **Q** Fail Safe Device
 - ▶ **Q** Offsite Backups
 - ▶ **Q** Clone
 - ▶ **Q** Is historical data moved to an
 - ▶ **Q** Backup Encryption
 - ▶ **Q** Test Restores
 - ▶ **Q** Database aware
 - ▶ **Q** Retention requirements
 - ▶ **Q** Daily
 - ▶ **Q** Endpoint backup
 - ▶ **Q** Is the backup working?

- ▼ **C** Workstations
 - ▶ **Q** Saving Files
 - ▶ **Q** Backup Encryption
 - ▶ **Q** Laptop Encryption
 - ▶ **Q** Agent Software
- ▼ **C** Plan
 - ▶ **Q** Asset List
 - ▶ **Q** Install Media and Licenses
 - ▶ **Q** Evacuation Plan
 - ▶ **Q** BDR Plan
- ▼ **C** Internet Access
 - ▶ **Q** Automatic Failover
- ▼ **C** Server Power Management
 - ▶ **Q** UPS Startup
 - ▶ **Q** UPS Run Time
 - ▶ **Q** UPS
- ▼ **C** Workstation Power Managemer
 - ▶ **Q** UPS
 - ▶ **Q** UPS Runtime
 - ▶ **Q** Surge Suppressor
- ▼ **C** Email Backup
 - ▶ **Q** Daily Incremental Backups
 - ▶ **Q** Weekly full backups?
- ▼ **C** Archiving
 - ▶ **Q** Email Archiving
 - ▶ **Q** Data Archiving
- ▼ **S** Network Security
 - ▼ **C** Domain Password Policy
 - ▶ **Q** Complex Passwords
 - ▶ **Q** Password Age
 - ▼ **C** Remote Access / VPN Policy
 - ▶ **Q** Strong Authentication
 - ▶ **Q** Essential Employees

- ▼ **C** Firewall
 - ▶ **Q** Do you have a firewall in place
 - ▶ **Q** Active scanning
 - ▶ **Q** Content filtering
- ▼ **S** Wireless Access
 - ▼ **C** Private Wireless Access
 - ▶ **Q** Company only Wireless
 - ▶ **Q** WPA2-PSK
 - ▶ **Q** Strong Passphrases
 - ▶ **Q** MAC Filtering
 - ▶ **Q** Hardware
 - ▼ **C** Public Wireless Access
 - ▶ **Q** Guest network
 - ▶ **Q** Guest network location
 - ▶ **Q** Traffic Types
 - ▶ **Q** Segregation from Private Netw
 - ▶ **Q** WPA2-PSK
- ▼ **S** Environmental
 - ▼ **C** Power and Air Conditioning
 - ▶ **Q** Generator
 - ▶ **Q** Redundant Cooling
 - ▶ **Q** UPS devices
- ▼ **S** Domain & DNS Security
 - ▼ **C** Domain Names
 - ▶ **Q** Registration Period?
 - ▶ **Q** Valid email
 - ▶ **Q** Additonal emails
 - ▶ **Q** Provider
 - ▼ **C** DNS
 - ▶ **Q** DNS Provider

- ▼ **S** End User Training & Policies
 - ▼ **C** Computer Usage
 - ▶ **Q** Computer use policy
 - ▶ **Q** Email policy
 - ▶ **Q** Internet Policy
 - ▼ **C** Internet Safety
 - ▶ **Q** Spam & Fishing
 - ▼ **C** Social Engineering
 - ▶ **Q** Over Sharing
 - ▼ **C** Password Management
 - ▶ **Q** Password usage
 - ▶ **Q** Password policy
 - ▶ **Q** Single use password
 - ▼ **C** Remote Access
 - ▶ **Q** LogMeIn or other remote desk
 - ▶ **Q** Dropbox

Client:

Summary Score: **61%**

Hardware

✓ : 3 ⚠ : 3 💣 : 1

Servers & Storage | Score: (100.0 %)

✓ : 1 ⚠ : 0 💣 : 0

Impact	Question	Technical Analysis	Recommendation
✓	Up to date: Is the current server hardware in warranty?	Server was purchased and installed April 2015.	

Desktops & Laptops | Score: (0.0 %)

✓ : 0 ⚠ : 0 💣 : 1

Impact	Question	Technical Analysis	Recommendation
💣💣💣	Up to date: Is the current desktop & laptop hardware in warranty?	The machine named "Bowe's iMac" last reported in in July of 2014. If it is still in use, that computer is six years old. It is labeled "vintage" so parts cannot be ordered. The machine named "Christin Evans' iMac" is five years old. The machine named "Jonathan's iMac" is four years old. The machine named "Rising Tide" is six years old. The machine named "Macbook Pro Spare 1" is six years old. The machine named "Sonny Scott's iMac" is six years old. The machine named "Tim Garon's MacBook Pro 4" is two years old.	

Network Firewall | Score: (100.0 %)

✓ : 2 ⚠ : 0 💣 : 0

Impact	Question	Technical Analysis	Recommendation
✓	Capabilities: Is the current firewall less than 3 years old, or Is the capable of keeping up with current internet speeds?	The firewall was installed June of 2014.	

Hardware

✔ : 3 ⚠ : 3 💣 : 1

Network Firewall | Score: (100.0 %)

✔ : 2 ⚠ : 0 💣 : 0

Impact	Question	Technical Analysis	Recommendation
✔	Filtering: Does the current network firewall scan for content as it's downloaded? Specifically, can it scan for content, viruses, spam & phishing attacks?	The firewall scans for content and viruses. We do not scan for spam and phishing attacks because the email is hosted by Google.	

Wireless Access | Score: (50.0 %)

✔ : 0 ⚠ : 2 💣 : 0

Impact	Question	Technical Analysis	Recommendation
⚠ ⚠ ⚠	Up to date: Is the current wireless hardware less than 3 years old	If your work does not rely on a wireless network, this is not a huge issue. If you'd like to have a solid, reliable wireless network, this should be addressed.	
⚠ ⚠ ⚠	Capabilities: Does the current wireless network support current networking standards and speeds?		

Network Switch | Score: (50.0 %)

✔ : 0 ⚠ : 1 💣 : 0

Impact	Question	Technical Analysis	Recommendation
⚠ ⚠ ⚠	Up to date: Is the current network switch hardware within 5 years old?	This information is unknown, we need to look at the switch and determine its age.	

Backup and Disaster Recovery

✔ : 10 ⚠ : 14 💣 : 7

Server Backup | Score: (80.4 %)

✔ : 7 ⚠ : 4 💣 : 1

Impact	Question	Technical Analysis	Recommendation
✔	Offsite Backups: Backup data is located in a secure offsite location.		
✔	Test Restores: Test restores are performed quarterly	Crashplan verifies data for restore capability automatically.	

CONSULTING

- The customer pays for your expertise
 - not what you can personally do for them
 - but what your company should be able to do for them

ONE WORD

- Standardization

MONITORING SERVICES

- Watchman Monitoring
- PaperTrailApp
- Longview
- Dejal's Simon
- Splunk
- Constellix

Metric

CPUMemorySwapLoadNetwork

Sort Method

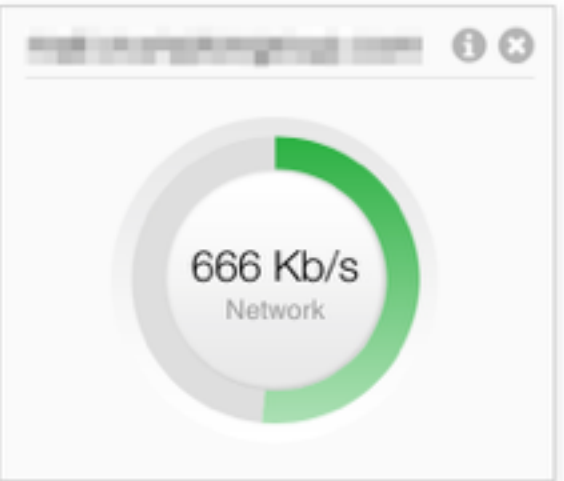
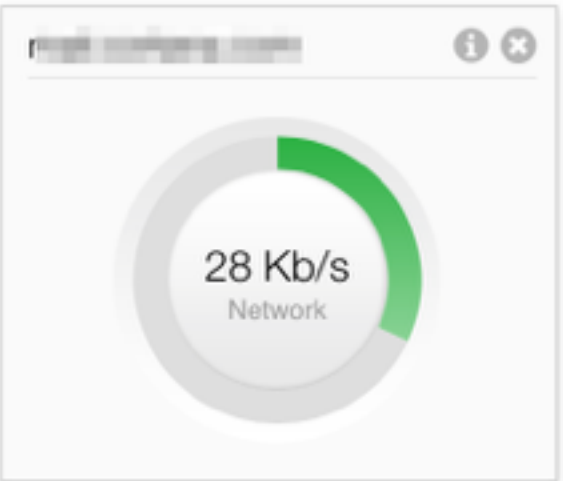
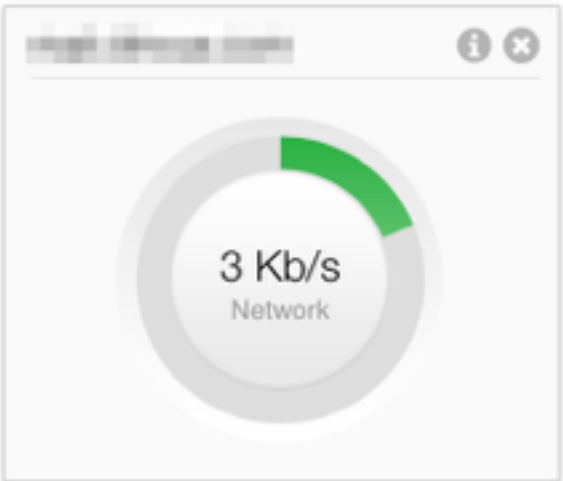
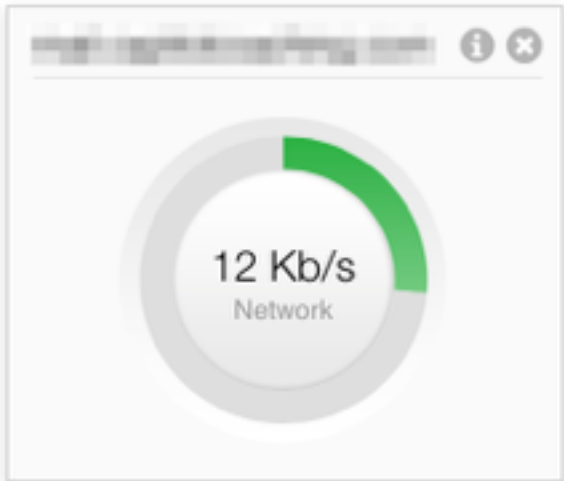
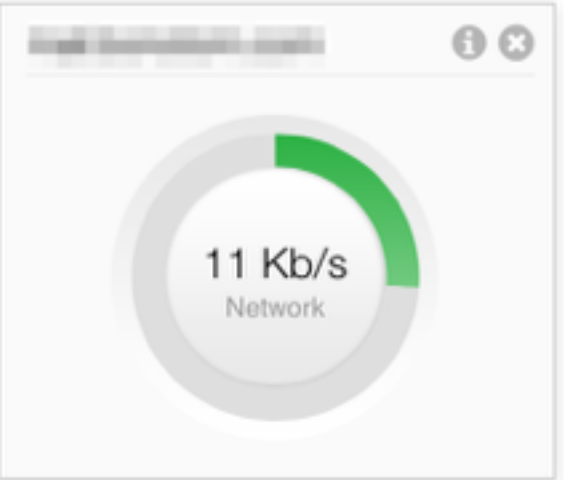
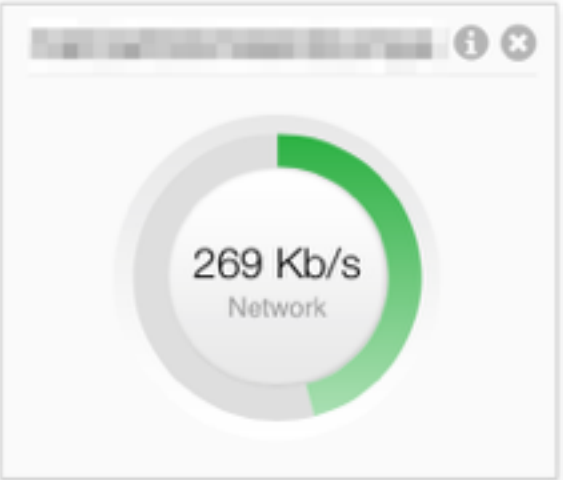
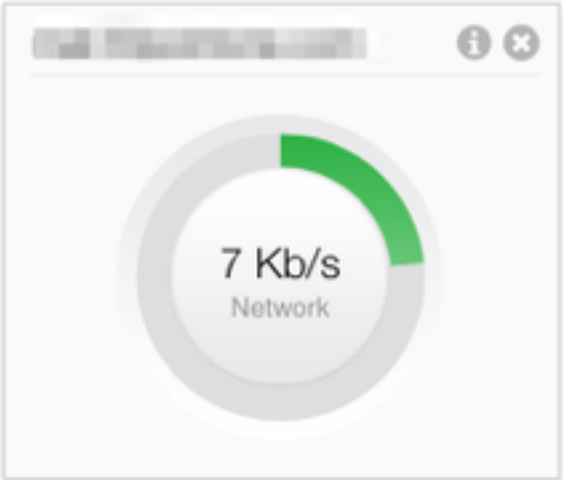
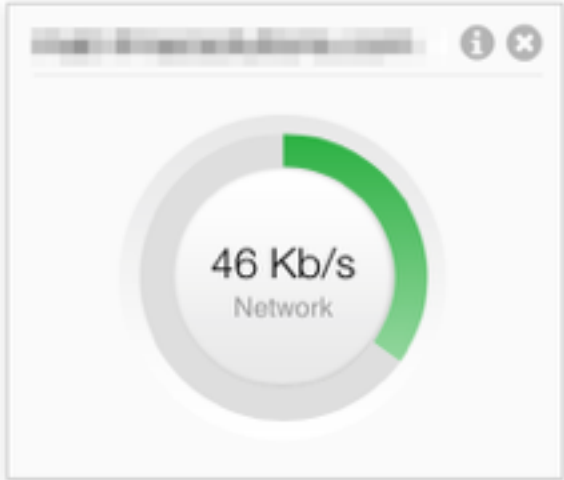
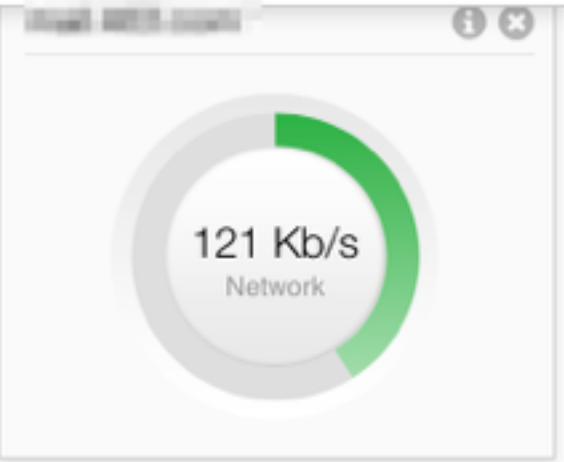
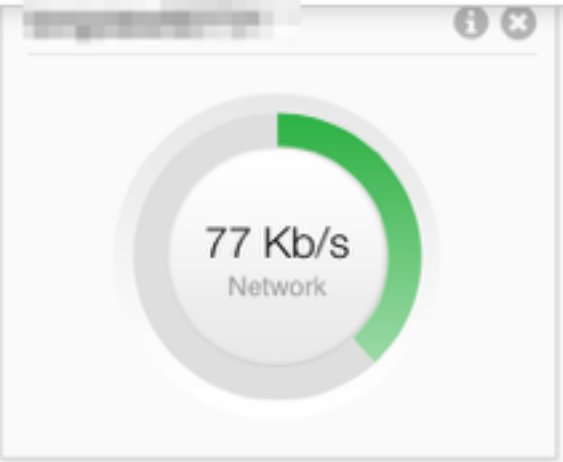
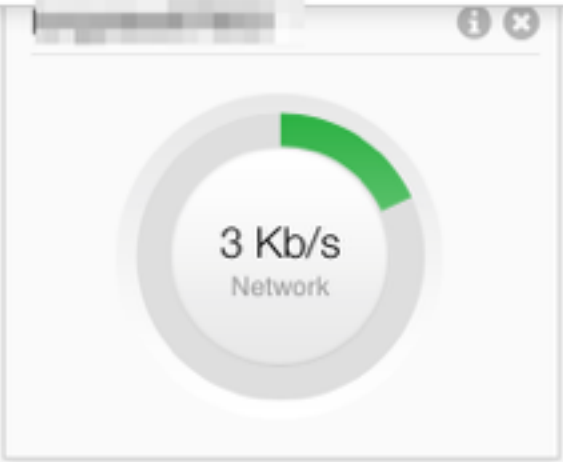
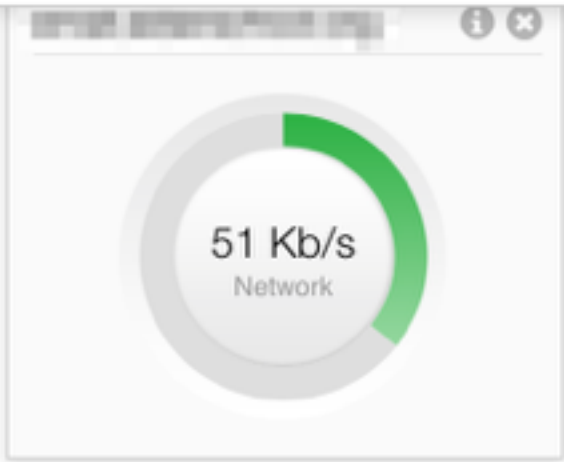
NameMetric

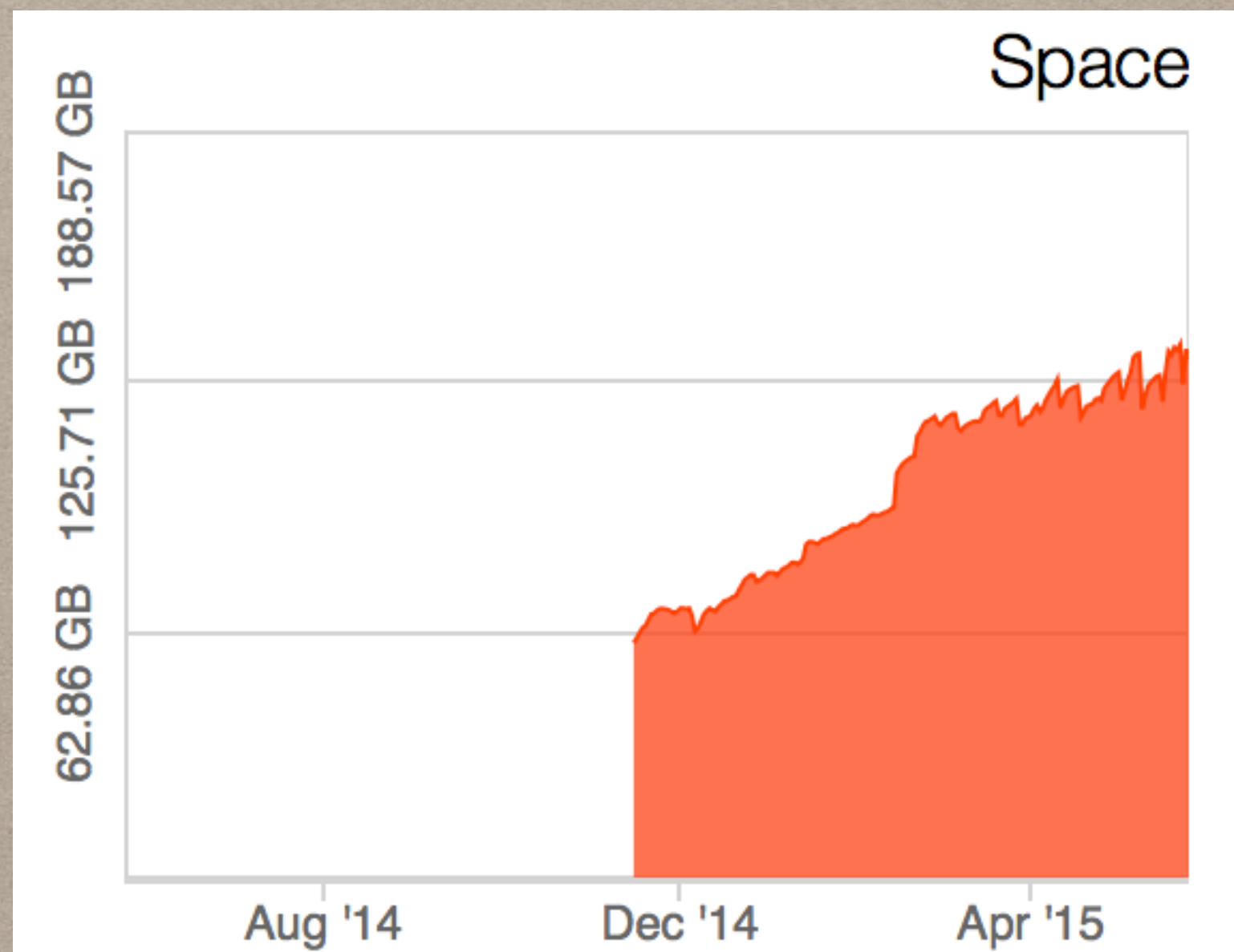
Sort Order

A-ZZ-A

Zoom

SmallMediumLarge+





[illegible]

EMAIL HOSTING SERVICES

- Do it yourself on a Kerio Connect Server (in someone else's cloud)
- Google Apps
- Office 365
- Rackspace
- Almost anybody but GoDaddy
- and certainly not iCloud

WEBSITE HOSTING COMPANIES

- Wordpress
- Rackspace
- Media Temple
- Linode
- Digital Ocean

SPAM FILTERING SERVICES

- McAfee SAAS
- Proofpoint

HOW DO YOU GET CUSTOMERS TO SEE THINGS YOUR WAY?

- Back to standardization:
 - Show them real results reports from other customers
 - Explain how downtime will affect them
 - Show direct & indirect costs
 - Show how long it takes to restore data from a cloud only destination

Downtime Cost Calculator

RECOVERY PROCESS

The recovery process represents the amount of time it takes to recover data either locally or from the cloud due to data loss (data loss could be the result of a virus, employee error, or some other type of system disruption).

CRITICAL SYSTEM DATA: X GB

Critical system data is the amount of data lost in a scenario resulting in employee downtime.

TIME BETWEEN BACKUPS: X DAYS X HOURS X MINUTES

The interval at which your backups take place. This is used to check the Recovery Point Objective.

RECOVERY PROCESS START: X DAYS X HOURS X MINUTES

The time it takes to initiate a file or system recovery. This includes alerting a Managed Service Provider and configuring the recovery point.

ESTIMATE DOWNTIME: X DAYS X HOURS X MINUTES

The amount of downtime is determined by adding the **RECOVERY PROCESS START TIME** to the amount of time it takes to fully recover the data lost. The speed at which the lost data is recovered is determined by whether it's being restored locally or from the cloud.

Local Speed: The default local restore speed is based on a typical gigabit connection.

Cloud: The default cloud restore speed is based on the average internet connection speed of businesses in the U.S.

Since local recovery is faster than cloud recovery, local recovery will result in less downtime.

Example:

**RECOVERY PROCESS START TIME +
LOCAL RECOVERY TIME = DOWNTIME**

1HR + (100GB / LOCAL SPEED) = DOWNTIME

1HR + (819200Mb / 700Mbps*) = DOWNTIME

1HR + 1170S = DOWNTIME

DOWNTIME = 1HR 20MIN

RECOVERY PROCESS

CRITICAL SYSTEM DATA: 100 GB

TIME BETWEEN BACKUPS: 0 DAYS 0 HOURS 15 MINUTES

RECOVERY PROCESS START: 0 DAYS 4 HOURS 0 MINUTES

ESTIMATE DOWNTIME: 0 DAYS 11 HOURS 35 MINUTES

DOWNTIME COSTS

EMPLOYEES AFFECTED: 10

AVERAGE WAGE: \$25/HR

OVERHEAD COSTS: \$15/HR

REVENUE LOST: \$1000/HR

TOTAL COST: \$1265/HR

TOTAL DOWNTIME COST (DOWNTIME * COST PER HR)

\$14661.35

RECOVERY TIME OBJECTIVE **NOT MET**

RECOVERY POINT OBJECTIVE **MET**

PRINT

Tickets created last 30 days

597

▲ 8%

Median first reply time

1.5 hours

▼ 53%

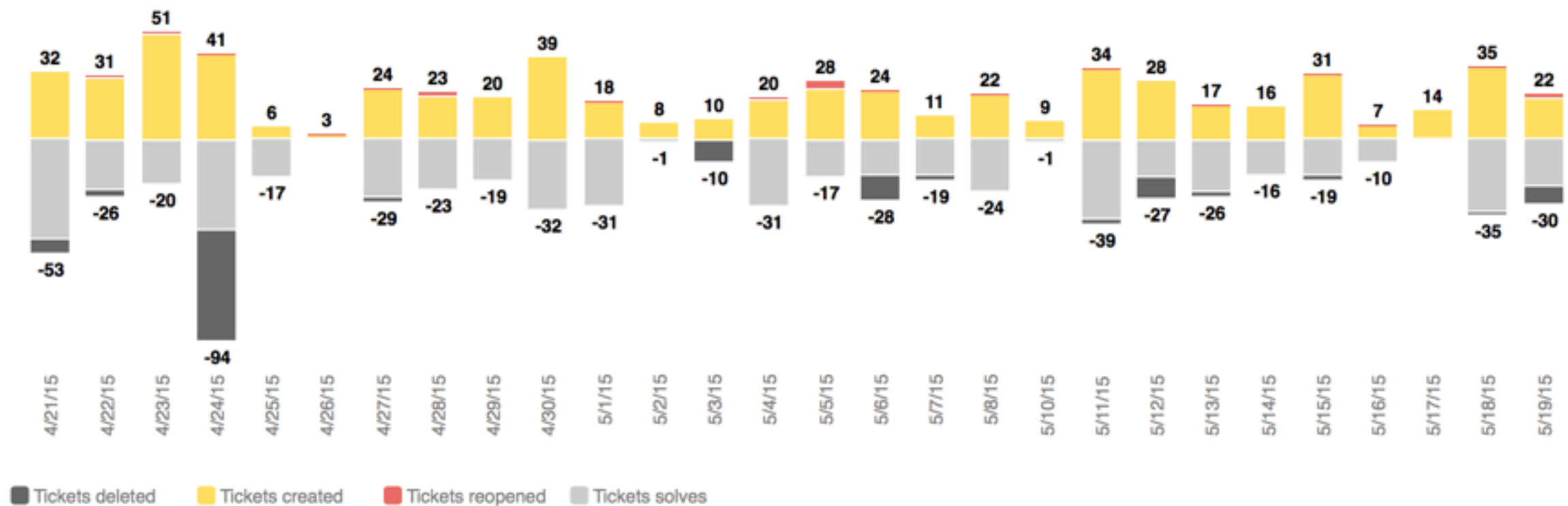
Customer satisfaction

98%

▲ 2%

[Drill in supported](#)

Daily ticket activity for the last 30 days



TICKET GROUP

All

TICKET VIA

chat, email, face...

ORGANIZATION

463 Communica...

CUSTOMER

All

BRAND

All

Tickets created last 30 days

139

▲ 49%

Median first reply time

0.3 hours

▼ 71%

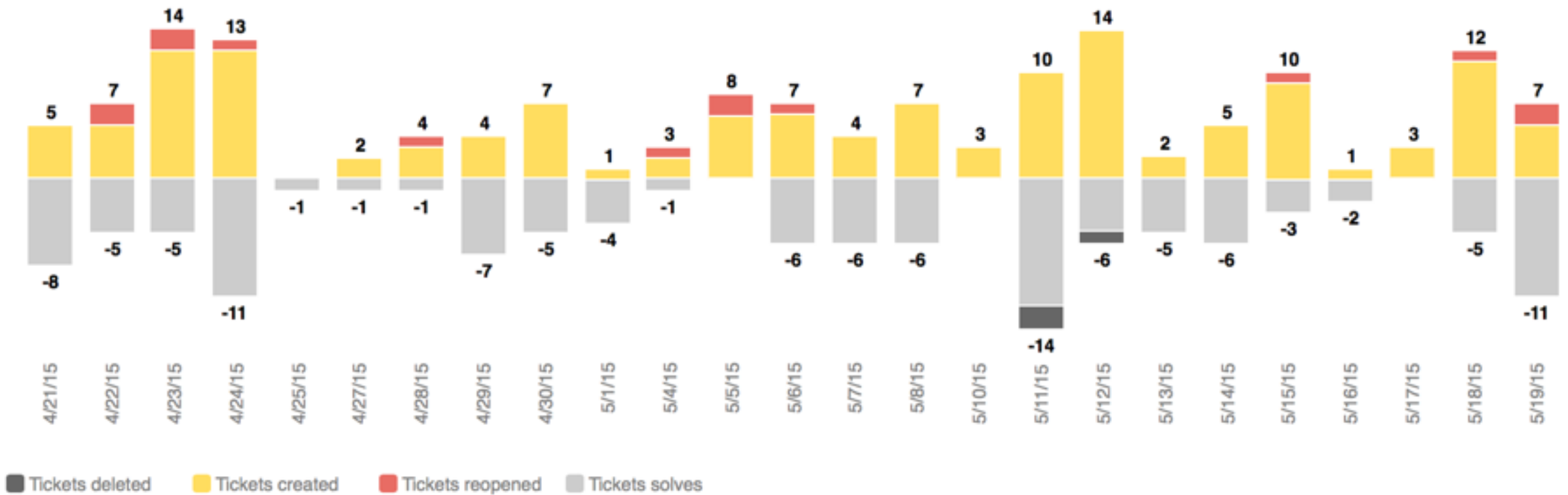
Customer satisfaction

100%

no change

[Drill in supported](#)

Daily ticket activity for the last 30 days



AT THE END, WHAT DO WE HAVE

- After you have settled on a set of services to offer
- Have standardized your customers on that set of services
- And have documented everything,

HIRE SOMEONE TO DO THE WORK FOR YOU

-what you need to do to grow

CONTACT ME

- Will O'Neal
- Mid-Atlantic Computer Solutions
- woneal@4macsolutions.com
- 703.236.5800 x 101