

If It's Not in ConnectWise, It Didn't Happen

How to Eliminate the Chaos and Gain Total Control of Your Business



A guide for system integrators,
value-added resellers and solution providers.


ConnectWise[®]
ConnectWise.com

Difficult economic conditions and a wave of new technology have businesses on their heels.

How can system IT solution providers step up and help?

A recent study by IBISWORLD found that the price of computers and related equipment is falling as a result of “recession-era consolidation. Along with overall economic improvement, this trend will encourage consumers and businesses to increase their computer-related purchases.” However, it’s not just about hardware anymore. An interview in Vertical Systems Reseller magazine notes, “The solution becomes the driver of the sale” and should be an important part of your value proposition.

Businesses of all sizes continue to cite technology as increasingly important to their success. Consequently, IT firms that can deliver on the promise of technology-driven solutions are finding plenty of opportunities.

- Tim Herbert, Vice President of Research, CompTIA

The VAR Guy is scratching his head: PSA solutions are proven. But for some reason, less than one-tenth of today’s solutions providers have gotten the message. What are 70,000+ resellers waiting for?

- The VAR Guy, Popular IT Channel Insider and Blogger

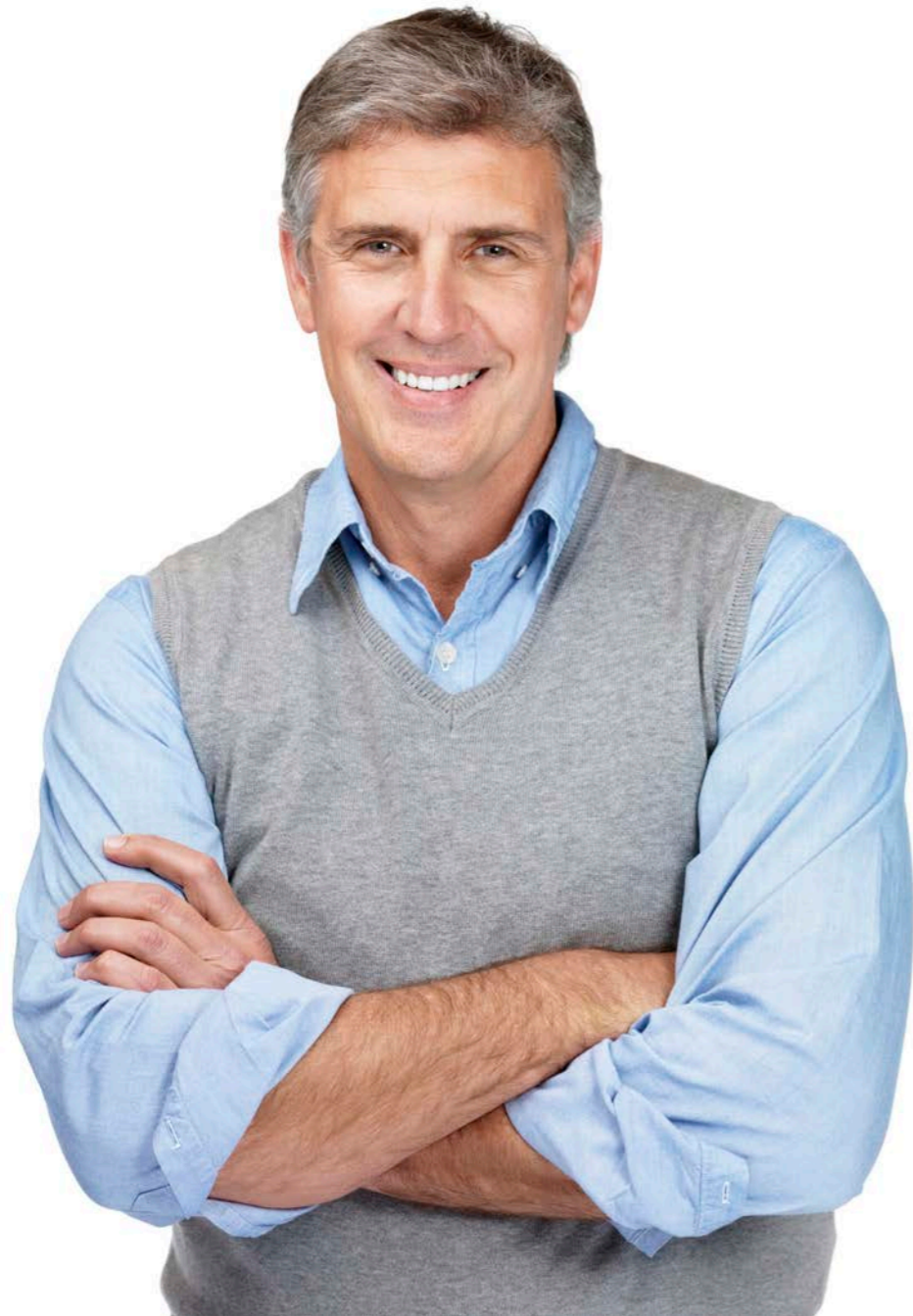
If It’s Not in ConnectWise, It Didn’t Happen.

Disparate systems can make it difficult to support customers, manage service level agreements (SLAs), and ensure timely contract renewals. This eBook examines how many successful IT companies use ConnectWise to eliminate the chaos and tie together all the components of their business, provide more value to customers, and maximize profitability.

At ConnectWise, we tell our customers if it’s not in ConnectWise, it didn’t happen. Discover how VARs and system integrators like you use our professional services automation (PSA) solution to gain complete control over business processes and achieve success with a total 360° view of day-to-day workflows and results.

Table of Contents

How to Eliminate the Chaos and Gain Total Control of Your Business



Chapter 1

Improve Operational Efficiency

Chapter 2

Automate Service Workflows and Improve Customer Experience

Chapter 3

Get Control of Project Details

Chapter 4

Win More Business with Real-Time Quoting

Chapter 5

Get Paid Faster with Accurate Invoicing

Chapter 6

Nurture and Grow Your Customer List

Chapter 1

Improve Operational Efficiency



Have you ever discovered a customer issue that's been sitting untouched for days or weeks?

The customer is furious ...now what do you do?

Customer issues can come in from many different sources like email, phone, chat or your online portal. It can be difficult to keep track of them all and practically impossible to get control of when and how they are resolved.

Successful system integrators and VARs rely on the timely handling of customer support issues. It is critical in maintaining service level agreements (SLAs) as well as providing high levels of customer satisfaction. By streamlining and improving operational efficiency with ConnectWise, you can manage more tasks with limited resources and increase profitability.



425% productivity improvement

Contact centers appreciate chat functionality for its cost efficiencies and gains in productivity. Phone agents typically handled an average of 2.7 customer calls per hour, while a chat agent can handle an average of 11.5 chats per hour. This is a 425 percent improvement in productivity.

Forrester Research's North American Technographics survey

Maintaining SLA Metrics Without Adding Staff

Using a powerful automation tool like ConnectWise, you can keep track of everything that happens in your business. Every customer issue can be turned into a ticket, which is tracked all the way through resolution. Using audit trails and response time measurements, you'll have all the information you need in one system to evaluate the issue resolution process and report on SLA metrics.

Adding integrated chat functionality, ConnectWise further increases support efficiency by enabling technicians to simultaneously assist multiple customers. Get the tools you need to grow your business without having to add more staff.

QUICK TIP

If it's not in ConnectWise, it didn't happen.

Everything can be a ticket, simply define your process and see it through to completion:

- Create and maintain an updated list of services you offer from support and hardware maintenance to proactive service management and IT consulting
- Determine your service types and service teams
- Define the value stream for each service type
- Assign service boards for each team
- Define the steps needed to resolve a ticket



Chapter 2

Automate Service Workflows

and Improve Customer Experience

Some businesses waste too much time and resources trying to put out fires.

Whether it's a support issue that fell through the cracks, missing SLA metrics, or letting a contract expire, all of these problems negatively affect customer satisfaction and profitability.

Standardizing service workflows—the process from first call through issue resolution—and automating communication with customers can help distinguish you from the competition. With role-defined workflow rules, you can automatically notify or escalate issues to the appropriate person and increase your team's productivity.

Putting issues and processes in ConnectWise eliminates the chaos and ensures that everything gets done the way you want, when you want. For example, with ConnectWise you can automate repeatable processes to increase efficiency and success:

Support ticket status. Define internal and external notifications to be executed when a support ticket is changed to a specific status. This saves the service team time by alerting the appropriate people about an issue, without having to remember who needs the email.

Renewing support contracts. When a contract reaches a certain age or date, ConnectWise automatically notifies appropriate employees to begin a documented process to renew the customer.

Automated notifications. You can acknowledge receipt of a service ticket based on email or portal submission and announce service level milestones. Track warranties of client hardware and software.



STATISTICS

25%

"(We) have improved our efficiency at closing tickets by as much as 25%!"

-Dave Brewer, President, BC Networks, Inc

93%

customer service is a top priority

"93 percent of respondents said customer experience (CX) is on their company's list of top strategic priorities. For 28 percent, it is the top priority. We've shown through both mathematical correlations and actual company scores that when your customers like the experience you deliver, they're more likely to consider you for another purchase and recommend you to others."

-Megan Burns, Forrester (http://blogs.forrester.com/megan_burns)

Get the results you want from your business

ConnectWise ensures that you provide a smooth, continuous process for your customers—from sales through implementation and support. You can create unique agreements for every customer to track items like service hours and implementation times. Plus, you'll gain real-time visibility of business health with built-in dashboards that help you track key performance indicators and proactively manage your business.

QUICK TIP

Use automated workflows and notifications to provide timely updates on upcoming contract renewals, service level milestones, and service ticket status.



Chapter 3

Get Control of Project Details



How many times has project information been misplaced or lost at your company?

Do you know how many billable hours you lost as a result?

Keeping track of paperwork can be cumbersome. But losing out on profits is downright painful. Best practices in project management require two essential elements: collaboration and coordination. ConnectWise gives you the power to assign tasks and track progress. Best of all, it delivers full visibility into project details so you never have to worry about lost information causing delays or inaccurate billing again.

With ConnectWise, projects happen. You can track tasks for new customer implementations, ensuring a smooth, professional process from the beginning. Once a sales opportunity is won, a workflow is triggered that starts the implementation process. You can define activities for each stage and monitor progress to ensure any changes or add-on work is documented and customers stay happy.

“We’ve always responded quickly to customer needs. I just don’t believe we were getting paid for everything. Now, engineers have to enter where they went and what they did so we have accurate counts of billable hours.”

-Dave Schrembeck, Owner, DBS Communications

Why Documentation Is So Important

A telecommunications systems integrator, DBS Communications managed projects using a manual paper folder system for years before recognizing the need for change. Founder Dave Schrembeck needed a solution that could accommodate the paperwork needs of his business and cut down on the amount of run-around time for technicians looking for information.

With ConnectWise, Schrembeck no longer has to worry about lost files because all the documentation DBS has for a job is appended directly to each ticket. "ConnectWise gives us the ability to keep anything and everything associated with a job. Employees can quickly and easily access that information. It's not three different phone calls to see if we can find something anymore."

ConnectWise also helps Schrembeck hold his team accountable with accurate information regarding where employees stand on timekeeping and tickets. In addition, they can provide better, more thorough information to customers about progress and costs.

QUICK TIP

Use service boards in ConnectWise to view tickets by customer. From there, you can compare time spent on each account to contract values so you can determine who your 'best' and 'worst' customers are.



Chapter 4

Win More Business

with Real-Time Quoting



It's not enough to get the sale.

It is critical to capture information for pipeline reports and provide professional, accurate quotes that are on the same page with accounting.

All too often, the sales team completes quotes on a case-by-case basis without being documented. The process can be disjointed at best and cost the company money in lost productivity, late and unprofessional proposals, and inaccurate figures.

ConnectWise gives you access to real-time pricing information so you can provide fast, accurate quotes to customers. You'll slash quote preparation time with a repeatable, engaging process that delivers attractive, on-time proposals to customers electronically. You can even give customers the ability to accept and pay quotes online, significantly reducing the time to order. Best of all, your quotes are integrated with the entire procurement and accounting process ensuring success from beginning to end.

“To compete with the big guys ... you've got to generate accurate, comprehensive price quotes far more rapidly. It's not enough to sit down with a customer, offer sound advice and great customer references. You need to follow up rapidly and seal the deal with a compelling proposal.”

-Joe Panettieri, MSP Mentor

Curing a Brutal Procurement Process

Leo Reap found the solution to the painful quoting and procurement process at IT Resource. Before, all quotes and purchases were completed on an individual basis, with quotes going to customers in email. Accounting often didn't know what price a customer was quoted and would find out from the engineers after the fact how much to bill a customer for software or hardware that was already installed.

"ConnectWise has streamlined our procurement process by 1,000%! Now, the engineer simply provides a bill of materials to the sales person, who creates a quote, which in turn creates the opportunity in ConnectWise." Reap is enjoying the higher profitability at IT Resource with the streamlined quote to execution process. "Our sales staff has been able to create professional quotes while on the phone with customers and the success rate is phenomenal."



QUICK TIP

Establish an integrated quoting process to ensure accurate, on-time proposals that make a great first impression and win more business. ConnectWise makes it happen with real-time quoting.



Chapter 5

Get Paid Faster

with Accurate Invoicing

Your business will never be truly profitable if you can't get accurate invoices out the door.

System integrators and VARs often have a small accounting staff that can easily get backed up when preparing client invoices. Who can blame them? Invoicing takes time. Hours spent tracking work performed, calculating billable time, and importing information into accounting add up quickly. Even worse is the feeling that you might be overcharging a client or leaving money on the table.

ConnectWise puts important financial data at your fingertips and ensures customers receive accurate invoices. It integrates project and ticket information with your accounting system making it easy to track billable tasks and hours, expensed items, and workflow. With ConnectWise, you can automatically generate detailed invoices so customers receive invoices faster than before. Plus, you'll get paid faster with online and credit card payment options.



14%

In 2010, 14% of businesses said their most challenging problem was getting paid – up from 2% in 2008.

Source: Entrepreneur

40%

The National Federation of Independent Business (NFIB) found that 40 percent of small-business owners reported up to one-third of their receivables more than 60 days delinquent.

Integration Provides Control of Cash Flow

Eric Hanson knows his job is to keep his customers up and running every day and keep their IT systems in good health. As CEO of a small company, Inland Productivity Solutions, he increasingly noticed that healing his customers' IT ailments was far less daunting than running an efficient business. As the business grew, invoicing customers became much more time consuming than it should be. Disparate systems made information sharing tough.

Inland turned to ConnectWise to integrate and automate their business functions. Now, Hanson can track actual and work-in-progress hours against invoiced hours, support exception write-up or write-down, and many types of billing arrangements. With ConnectWise, Inland can easily and accurately measure performance and report results to customers.

QUICK TIP

Use the account on hold feature to keep your support team up to date on client account status and ensure you get paid before new work is done.



Chapter 6

Nurture and Grow

Your Customer List



Marketing communications is one of your company's most important activities.

Yet it is easy to forget about when you are focused on providing top-notch services to your customers. Gain control of your marketing efforts. You can rely on ConnectWise to coordinate your marketing communications and help you reach your target audience with the right messages at the right time. If you put it in ConnectWise, it will happen.

With built-in email marketing, you can automatically send electronic communications to customers any time your company has something to share. Integrated with customer history, you can send messages about new products or services, upcoming industry events, and milestone announcements. ConnectWise can also provide you with automated notifications that inform you when messages are delivered and received.

\$41 ROI on email marketing

The Direct Marketing Association found that the return on investment for email marketing is still about \$41 per dollar spent. More businesses than ever are turning to email marketing as a main vehicle for marketing communication.

Forrester Research's North American Technographics survey

68% **expect higher customer engagement**

68% of respondents said they expect higher customer engagement to lead to increased sales. Firms expected at least some of those increases to come from existing customers who, when more engaged, make more frequent purchases.

Email is cited as the most effective channel among B2B marketers:

59%

59% say email is the most effective channel for generating leads.

88%

88% say they are using email marketing as a branding channel.

- Forrester Research

QUICK TIP

Send regular communications to potential and current customers to keep engagement high and ensure your business is top of mind.



Conclusion

Whether you are a system integrator or VAR, ConnectWise integrates key business processes so you can achieve greater accountability, operational efficiency, and profitability. Remember: If it's not in ConnectWise, it didn't happen. A powerful centralized system, ConnectWise makes sure everything gets done in a timely, professional manner. ConnectWise brings all aspects of your business together with the real-time collaboration you need for increased insight. ConnectWise provides the support you need to succeed today and well into the future:

- Increase profitability by automating common tasks.
- Improve cash flow by better tracking billable hours and managing employee work and resources wisely.
- Enhance service levels and customer satisfaction with accountability in your service level management.



About ConnectWise

Made for companies that sell, service, and support technology, ConnectWise is the #1 business management platform worldwide. Today, more than 80,000 users rely on ConnectWise to achieve greater accountability, operational efficiency, and profitability. The platform fully integrates business-process automation, help desk and customer service, sales, marketing, project management, and business analytics that dramatically streamline a company's operations. ConnectWise also gives its users access to a powerful network of ideas, experts, and solutions. A veteran in the technology services industry, ConnectWise has been the premier business management platform for technology companies for more than 15 years. For more information, visit www.ConnectWise.com or call 800-671-6898.

“ConnectWise was critical to literally doubling our labor revenue—not including our hardware revenue—with the same number of employees. It connected people in the business process and gave us a way to tell customers what we did for them.”

- Larry Shulman CEO, LMS Tech Services