



Best Practices for Service Management

5 Ways to Increase Client Satisfaction and Profits

The successful Information Technology (IT) services business depends on satisfying customer needs.

However, to be competitive and achieve long-term success, it is critical for any service-based organization to have complete control and transparency into its processes.

Its solutions must streamline, automate and integrate the delivery of services and projects, and address the unique requirements of specific vertical markets. IT companies need to look for ways to grow their traditional break-fix service environment, which is characterized by emergency-based interactions, toward a more predictable and profitable managed services environment.

Managed services provide a framework in which the service team can operate most efficiently and client satisfaction increases. It is predictable and proactive – which allows the service team to improve utilization and response; plan ahead; and invite customer feedback. A win-win-win for both the IT company and its clients.

This eBook will look at how to take this automation a step further. By deploying a managed services solution, IT companies can also benefit from automated service workflows, closed loop communication and the ability to schedule recurring tasks. As your service team becomes more proactive and can do more for your clients, they will see you as a true partner in their organization, rather than just another help desk.

Without a professional services automation tool (PSA), your business may waste too much time, resources and revenue trying to put out fires. Even with an automated service ticket process in place, there are opportunities to improve service team management. Look for ways you can standardize service workflows and automate communication with customers and even recurring tasks. By taking these extra steps, you can distinguish yourself from the competition by offering proactive, business-focused IT services. Here are five tips to help you better manage your service team – and take your company to valued partner status with your clients.



TIP 1

Automate Service Workflows



Tip 1

Tip 2

Tip 3

Tip 4

Tip 5



If you have already automated your service ticket process, you most likely took the time to define your ticket process to help you better manage issue resolution. Did you also set up other service workflows? Service management software helps you efficiently and effectively manage projects to speed up cash flow and increase revenues. When you automate service workflows, nothing is dropped. For example, ConnectWise service management software can help you establish workflow rules that are role-defined and can automatically notify or escalate issues to the appropriate person. For example, you can set up the following automated workflows to help increase efficiency of your service team:

- **Service ticket status workflows.** You will define internal and external notifications that will be executed when a service 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. Multiple steps can be set for each service status so that pertinent follow-up information is included. For example, when a ticket is complete, the email can include a link to a customer satisfaction survey to provide immediate feedback.
- **Service ticket escalation workflows.** You can also define steps to be executed based on conditions, or triggers, for a service ticket. Depending on the event, a ticket can trigger multiple actions including change boards, re-assign, or status change.
- **Automated notification to clients.** This is particularly helpful to provide timely status updates to clients. With more frequent communication, your service team can avoid both incoming and outgoing status update calls and improve consistency and quality of service response. When automated notifications are used, you have the power to decide who will receive notifications -- whether it is a billing contact, primary contact, contact for this ticket, or a combination of all three.

TIP 2

Leverage Closed Loop Communication



Another way to improve the efficiency of your service team is to make tickets the center of communication. With automated ticketing and service management, you can keep clients updated and aware of issue status. Clients want to know and see that you are working on their problem. The purpose of closed loop service is to provide an easy, reliable method of providing regular status updates and deliver feedback to both the customer and internal personnel.

This type of communication not only helps you better manage your service team, but it also distinguishes you from the competition. It is imperative that your clients know that you offer a variety of service solutions. It is equally, if not more important that you demonstrate the ability to back them up with a superior help desk. With closed loop communication, your clients have a tangible reminder of what you are doing – and what you have done – to support their business.

“With the ‘Closed Loop’ feature in ConnectWise, we now have all communication between our technical staff and our clients threaded within the ticket ... (and) have improved our efficiency at closing tickets by as much as 25%!”

- Dave Brewer, President, BC Networks, Inc.

Tip 1

Tip 2

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TIP 3

Schedule

Recurring Tickets



Tip 1

Tip 2

Tip 3

Tip 4

Tip 5



By automating the process of capturing and dispatching tickets, you will increase the productivity of your service team. But what about recurring tasks? Managed services solutions empower you to mirror regular service tickets so that they are always on schedule and never forgotten. You can automate regular tasks that deal with documents, finance, configurations and more, plus schedule the right resources to make sure these important client maintenance tasks are completed on time.

In addition, you can create a standard service template for one-off tickets that you know will happen frequently such as workstation and server installs. With these templates in place, tickets can be created and entered into the system quickly, ensuring you capitalize on important revenue opportunities.

TIP 4

Get Engineers to Update Ticket Status



Busy engineers tend to defer updating ticket status and often wait until they are finalizing their notes and have fully resolved a ticket. Try to make it easier for engineers to provide updates and encourage them to do it sooner in the issue resolution process. For example, limit the number of status selections for a ticket that follows the normal path and provide a clear, concise description for when to use each status.

Make sure you explain why it is important to your business that timely status updates are available both to the client and the service team. Effective communications to the client via a portal or email notifications will result in fewer calls requesting updates. With a service management solution, management can gain visibility of tickets that are getting stuck in the queue and take appropriate action.

“Since implementing ConnectWise a few months ago, we’ve been able to enhance process automation functions that, in turn, enabled our staff to be even more productive. That’s particularly helpful given the high growth we continue to experience.”

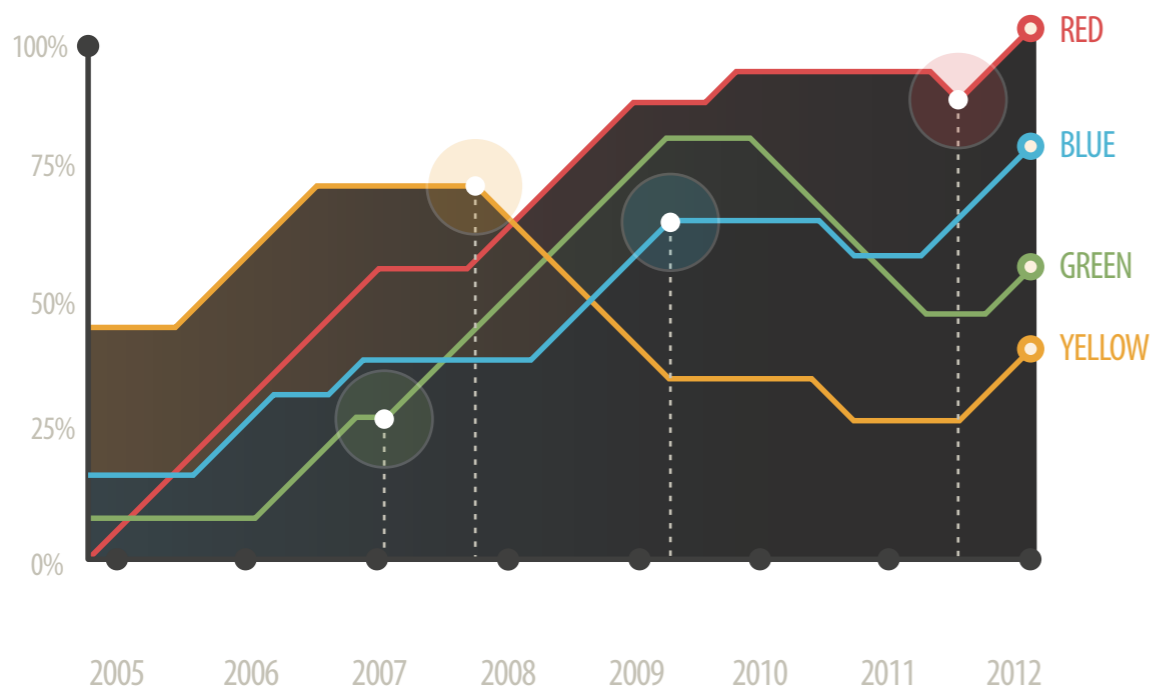
- Dave Brewer, President, BC Networks, Inc.

Tip 1 Tip 2 Tip 3 Tip 4 Tip 5



TIP 5

Deploy Managed Services (RMM)



Tip 1 Tip 2 Tip 3 Tip 4 **Tip 5**



When you deploy a professional services automation solution, you gain a system that streamlines the entire service workflow process, enabling you to better manage your service team. Without a managed services solution, it is difficult to measure the success of your service team and ultimately your business. "It's true that you can't manage what you can't measure. You can't adjust how the business is running if you don't have the details."

With built-in integration to many managed services solutions you gain greater transparency into project scheduling so you can track and evaluate the performance of your service team. You can automatically view all assets such as active and inactive workstations at a client site. You gain direct access to manage a device through the program. And you benefit from the ability to instantly view critical information through dashboards. With metrics at your fingertips, you'll be able to measure how well your company is doing, and make the necessary changes to ensure you are providing exceptional service.

BONUS TIPS



Preparing for the Cloud

As more and more applications and technologies move to the “cloud,” it is more important than ever to ensure your company has best practices in place to provide exceptional customer service. The cloud presents new opportunities for IT companies who are considered a valued partner to their clients. Because clouds typically have limited customer support, you need to ensure that your service team can step in to offer personal, responsive service when needed. With effective service management, your company remains relevant and valuable to clients.

Time Entry Best Practices

- **Provide a training program**
 - first time upon implementation; new hires; and then refreshers
- **Offer an easy reference**
 - (aka Job Aid) for when engineers need guidance
- **Provide method for mobile status update (CW Mobile)**
- **Use automated workflow**
 - identify tickets that have aged unreasonably without an update
- **Base performance management on metrics derived from statuses**
 - response, resolution, reopened tickets

Conclusion

These tips are not easily executed without a (PSA) professional services automation solution with built in integration with a remote monitoring and management tool (RMM). How you manage and motivate your team is just as important as automating processes. In the end, your business will benefit from lower service delivery costs, greater client satisfaction and ultimately, increased profitability. And as your service team becomes more proactive and can do more for your clients, you will become a valued member of your clients' organizations.

¹Sobel, Dave, "Using Metrics for Better Management," *ChannelInsider*, June 9, 2010, <http://www.channelinsider.com/c/a/Commentary/Using-Metrics-For-Better-Management-176266/>



About ConnectWise

Available anytime, anywhere, 24/7, ConnectWise is the leading business management solution designed exclusively for technology organizations, such as software companies, hardware/software resellers, IT solution providers, MSPs and System Integrators. Created by technology professionals, ConnectWise provides industry-leading software for support and ticketing, CRM, project management, invoicing, time tracking, procurement, and sales quotes and proposals. But ConnectWise is much more than just software. ConnectWise offers access to discounted tech certifications, community, best practices, forums, a robust online university, and business and technical consulting. Over 65,000 professionals, in 5,000+ companies, rely on ConnectWise to provide a 360 degree view of their technology driven organization.

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