How MSPs Should Implement Technology Standards

& Everything You Need To Know About Becoming A Proactive MSP

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Are You Really Proactive?

All MSPs say they're proactive. But it's been my experience that once you dig a little deeper, their roles, processes, and results tell a different story. What do you define as proactive? Most MSPs are focused mainly on tickets, alerts, and projects. Responding to alerts, answering support requests, and implementing new technology is critical but it's not proactive.

The core of being truly proactive is centered around standards and compliance. How do your clients align with your technology standards? How do they align with industry compliance standards?

As the president of TruMethods, I currently work with over 1,000 MSPs who use our training and our software, myITprocess. I've also helped build two top performing MSPs of my own. I've done this by defining what being truly proactive really means and then developing process and roles. The center of the process is the use of technology standards and alignment to drive high-value client relationships. In this ebook, I'll discuss how to develop and maintain a standards library. We'll also review how to build a high-value vCIO process using standards and alignment as a foundation.

What's A Standard?

Authoritative bodies define standards to help solve problems. Typically, standards need to meet thefollowing criteria:

• Introduce a long-term solution to an existing problem
• Receive mass adoption
• Be easily implemented by solutions providers

These specific qualities apply to standards across all industry types.

Standards prevent fragmentation among clients. They streamline operations, support, and the decision-making process internally. Other benefits include the consolidation of products and services offered to clients, and more efficient management of each product due to its adoption across the entire board.

Here's an example to consider: Southwest Airlines' entire fleet consists of Boeing 737 jets. Why is this so? The answer is simple when you think about it:

• Any Southwest pilot can fly any plane on any route.
• The airline's mechanics only need to know how to service and maintain a single type of plane.
• It's easier for Southwest to replace or repair planes when they all use the same parts.

How Should MSPs Develop Standards?

MSPs should develop standards around a framework or workflow. Standards should be based on a regulatory body, manufacturer recommendations, or vendor information.

It's best for an MSP to develop standards of implementation—such as installation or configuration of a product or service—around a manufacturer or vendor's best practices rather than their own.

Why? Implementation of these items becomes a "whisper down the lane" problem, where technicians keep passing down problems with adjustments.

Eventually, the "best practice" is so separated from actual vendor recommendations that it's merely a suggestion based off several opinions instead of an actual recommendation.

When crafting your own standards, consider the following:

• Determine which items you support, implement, maintain, monitor, and repair on a daily basis.
• Organize all items into proper sections and categories that make sense.
• Establish the proper re-occurrence for auditing your customers for alignment of those standards.
• If possible, don't do it alone.
• Don't forget to inform your customers of the standards you have!

There's No One-Size-Fits-All Approach

Standards vary from MSP to MSP. That's because MSPs have different business models. Some MSPs focus on general technology and support clients in a wide range of sectors, while others work with fewer clients in specific industries, such as medical or legal.

This is why cookie-cutter standards won't work with every client in your portfolio. It's always best to adapt your standards to your client's industry.

Crafting your standards will initially be time-consuming (I can promise you that much), but after you set some of the above suggestions in motion, your life will become a lot easier. You'll find the process to be a lot smoother than you had expected it to be.

Making Standards Come Alive In Your Organization

If you take anything away from this ebook, it should be the following point: You can't make standardscome alive alone!

Standards shouldn't be handed down from above. Your team members are there to help you with executing your business goals in several different ways. Ask your employees to help guide you in the right direction.

If you don't involve your teams in the standardization process, you're going to see a lot of unwanted pushback. Your employees are going to resist. While it's OK to keep your plans close to your chest initially—sometimes you don't want too many cooks in the kitchen—you'll want to eventually open your circle to other capable team members.

For example, set up a Standards Council within your organization. It's a wonderful way to get your entire team involved in the standardization process. Invite at least one member from every service delivery area to participate. By doing this, you're ensuring every role is represented during the standardization process, and you're covering all the bases.

Another idea to consider is a Standards Queue. This is basically an inbox where a team member can easily send standard recommendations. Maybe a technician reviewing tickets notices a pattern, for example, and has a standards suggestion to resolve the issues.

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Once there are enough recommendations, the Standards Council can review and consider each suggestion. This holistic approach to standardization is designed to encourage your team members to become part of the process by giving their input.

Create A Culture Of Curiosity

It all begins with you. You're the business owner, your organization's leader. You set the tone. If setting standards is going to be a paradigm shift for your company, your employees will need to feel the momentum.

They'll turn to you for guidance and reassurance during the change in focus. You'll need to bring your teams with you on the journey to standardization. You can start by instilling a culture of curiosity.

Your team members should always strive to be curious. This begins with you having a critical eye
about issues. Encourage teams to question and be open. This starts with them looking into the why of an issue instead of only looking at the what. Give teams leeway to investigate what's happening and empower them to submit their own ideas.

If you're having a difficult time making standards come alive, look in the mirror. Are you trying to bite off more than you can chew? If so, it's because you're going at it alone. Win your team over by inviting them into the standardization process by welcoming them to provide input on standards designed to help your business grow.

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Using Standards And Alignment To Drive A Strategic Business Relationship

Now that you have a better understanding of where you need to go and the obstacles in your way let's talk about the solutions. Once you accurately define your total reactive time and reactive hours per endpoint (RHEM) you need to lower it. Below are the steps that the top TruMethods Members (and my MSP) have followed to move up the stack.

1. Define your process for lowering RHEM. Set up a role and process for technology alignment.

2. Be sure you have captured all reactive tickets and time. This includes all support requests as well as tickets generated for your RMM. You cannot solve a problem that you cannot define.

3. Define your first 3-4 standards. Chose best practice areas that create noise and risks. You don't have to get them 100% complete on the first pass. 3-4 best practices with 20-30 questions each is good start. If you need help TruMethods includes a set of general technology standards in your myITprocess subscription. Your subscription also gives you access to a library of industry standards including NIST Cyber Security Framework, PCI, HIPAA, ISO, and the Center for Internet Security.

4. Schedule alignment visits with 4-5 of your noisiest clients. Complete the technology alignment process for each client.

5. Use the alignment information to create a Technology Summary and Strategic Roadmap for each client. Next schedule a meeting with the decision maker of each client to review the technology summary. TruMethods offers a vCIO training course to help streamline your process and workflow.

6. Put a plan in place to roll the process out to all clients. Schedule technology alignment visits for the next 12 months for each client.

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If you want to increase leverage and margin and command a higher price, then the process explained in this ebook needs to be your top priority. I have not only transformed two MSPs personally, but I have watched this process dramatically impact 100's of TruMethodsMembers. Don't wait, those tickets will just keep coming. Let's go, People!

\- Gary Pica

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