Technology Alignment Manager Standards & Training Manual

Discover the blueprint for the Technology Alignment Manager (TAM) role currently used by IT Managed Services Providers (MSP). We will perform a role analysis, break into individual components, and build a formal standardization when creating and managing a Technical Alignment Manager. Standardization of core fundamentals will help MSP's manage a number of employees fulfilling the position.

TruMethods
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Summary of Topics

The Technology Alignment Manager manual covers topics across the entire framework. This training guide is logically split into two parts: the Role and the Framework. The first half examines the Essence of the role, responsibilities, and importance of technical alignment. On the latter half, the TruMethods framework breaks into individual components and details the Technology Success Culture.

For ease of access to relevant content, each topic and a short summary is below. Feel free to skip to the section that is most interesting.

The Essence of Technology Alignment Manager

- The TAM Core consists of two items: Math and Process. The Math includes measurable drivers while the process contains priorities, steps, and tasks. The Results are the impact on the client, business, and the person in the role. The Essence is the spirit of the role that ties the Core to the Results.

The Technology Alignment Manager Role

- When the vCIO proposes solutions, the value of those recommendations is dependent upon completed alignment reviews. Knowledge of technology used by customers is necessary to perform a proper evaluation. But, a vCIO must have the ability to translate technical risk into business strategy. A decision maker will likely not understand technical language.

Understanding the TruMethods Framework

- TruMethods methodologies are the foundation of a Technology Success Practice. The TruMethods Framework explores development a World Class TSP. To grasp the concept of TSP, World Class, and the delivery areas, it is best to start from the beginning.

Technology Success Culture

- A Technology Success Culture revolves around standards, best practices, and processes. Although a TAM is central to technical alignment, they are not alone. Service Desk, Centralized Services, vCIO, and Professional Services work together to create a World Class culture.

The Essence of Technology Alignment Manager

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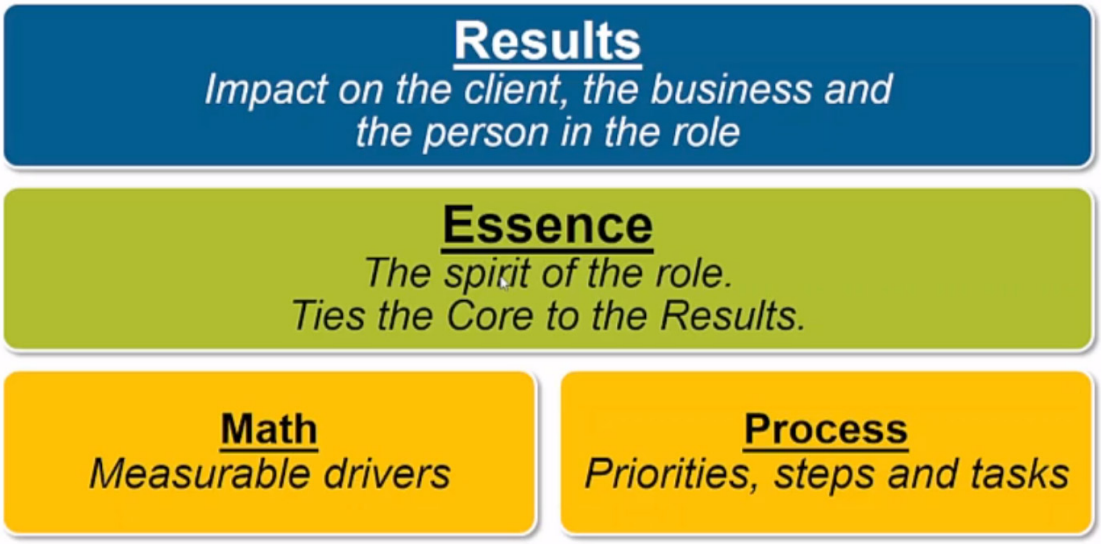
Measurable Drivers

The math used is for measurable drivers which benefits the customer and TSP. It provides real quantitative data for measuring trends and predicting future results. Management of clients using a numerical value enables simple graphing and easy readability.



- **Clients & MRR Managed:** A manageable number of accounts using the TruMethods process is 18-22. Client size and Monthly Recurring Revenue (MRR) ultimately determine how many accounts to manage. But, the leverage guideline is one TAM per $70,000 in Monthly Recurring Revenue.
- **Annual Alignment Visits:** A TAM has a set number of working days available and has a certain amount of alignment visits to complete per year. The frequency of visits is dependent on a client's size, scope, and complexity. Complex customers may need monthly visits while others may be quarterly or semi-annual.
- **Completed Categories:** Development of standards using categories can range in scope depending on compliance requirements.

Priorities, Steps, Tasks

Priorities, steps, and tasks make up the other half of the Core. These will define the day-to-day activities included in the role. These non-numeric items develop measurable drivers and not to produce data.

- **Schedule Onsite Visits:** A key aspect of the TAM role is onsite alignment visits. Schedule visits to be onsite and not performed through remote access. Face time with the customer is important for customer success. The size of the client dictates the frequency of onsite visits. They can range from monthly, quarterly, and once or twice per year. It is recommended to schedule onsite visits one year in advance.
- **Developing New Standards:** A vital component to technical alignment is the continued development of company standards. Maintain, update, and phase out standards as technology or a customer environment changes. Development of new standards is most efficient in a group setting. A Standards Committee is made up of other delivery areas within the TSP. These include vCIO, Service Desk, Professional Services, and stakeholders.
- **Documentation:** Keeping track of standards, technology, and processes are important for efficiency. Documentation creates historical records for all changes made in the past. It also maintains a current record of policies, procedures, and technology are in use.

The Essence of the TAM is to assess and align technology. Building a business relationship with customers is not the function of this role. This is not to say a TAM should not have face to face interaction with end-users. Maintaining a close relationship with a point of contact reinforces trust and competence.

A vCIO manages the business relationship and goals of each client. The TAM is instrumental in maintaining the standards library and aligning customers to those standards. TAMs are integral in determining which standards need modification, removal, or addition. A personable relationship imbues confidence between end users and the onsite technician. Customers prefer a resource that can interact on a business level. This is a technical relationship that differs from a vCIO's business relationship. A TAM focuses on standard and technical alignment of the IT environment. They will not perform business impact or client strategy meetings.

Familiarity with an IT environment on a technical level is the TAMs primary concern. It is not their prerogative to present recommendations to decision makers while onsite. Though encouraged to interact with end users, it is through technical means. Presenting recommendations to a decision maker is the responsibility of a vCIO.

Self-Assessment Questions

Much like the vCIO process, the TAM follows a Core set of rules. An absence of thought to the Core rules causes the snowball effect. Standards are no longer maintained, alignment fails, and customers receive poor service. Lacking a standards and alignment process dissolves the Technology Success Practice. A self-assessment of the TAM process will help guide.

Results

- Does the client understand the Technology Alignment Manager's role in the delivery of your Technology Success Practice?
- Is RHEM lower at each of your clients due to your Alignment process?
- Are your Technology Alignment Managers able to explain their role in the delivery of your Technology Success Practice?
- Are Technology Alignment Managers developing both technical and business acumen?
- Do the team members believe this role enables their personal development?

Essence

- Do your clients understand the alignment process?
- Do clients prioritize alignment over reactive tasks?
- Do you regularly communicate enhancements to Standards to the team and clients?
- Do you use the alignment process as a catalyst for the Technical Relationship?
- Are you an evangelist for Standards and Alignment to both clients and team members?

Core

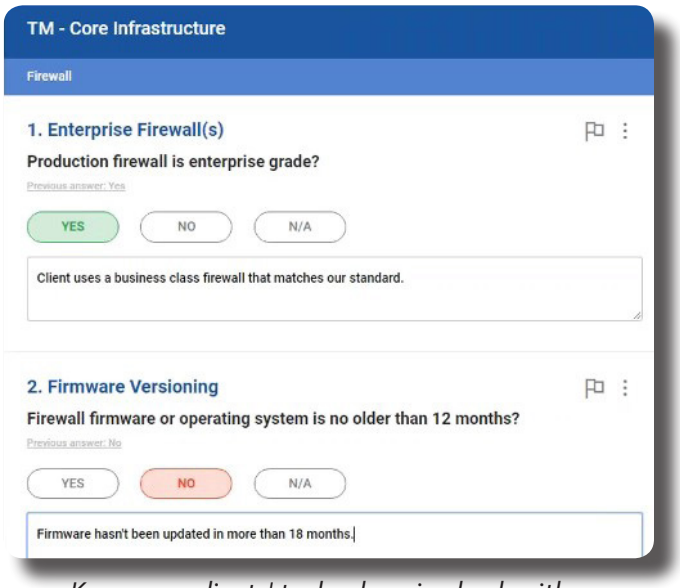
- Are your Technology Alignment Managers managing 20 clients (or capacity to)?
- Have you calculated the number of annual alignment visits and scheduled them?
- Have you determined the frequency for each alignment category?
- Do you complete all alignment categories, based on the determined frequency, each visit?
- Do your Technology Alignment Managers have a beginning and end of the day meeting with the client?

The Technology Alignment Manager Role

TAM is an essential core focus of the Technology Success Practice. When the vCIO proposes solutions, the value of those recommendations is dependent upon completed alignment reviews. Knowledge of technology used by customers is necessary to perform a proper evaluation. But, a vCIO must have the ability to translate technical risk into business strategy. A decision maker will likely not understand technical language.

What is Technical Alignment?

Technical alignment breaks down into two parts. The first is developing standards and best practices using a Standards Library. The other is performing assessments to align clients against those standards. Standards and best practices can be the responsibility of a Standards Committee. Group members should be members from other delivery areas to round out the skill set. Examples include vCIO, Centralized Services, and Service Desk. Involving TSP stakeholders like the CEO or other executives provides more business-oriented input. It is beneficial to the committee to include as many roles as possible.



Keep your clients' technology in check with our simple yes-no alignment process

Company standards alignment requires a technical review that occurs onsite. Annual onsite visits depend on client size and technology needs to be determined during onboarding. Technical alignment is not effective without scheduled alignment visits. The Technical Alignment focus is to:

- Develop and maintain technical knowledge of the client environment.
- Perform regular proactive service as a technical lead.
- Be responsible for upholding best practices and reporting recommendations to the vCIO.
- Cut reactive issues by controlling the number of submitted service requests.
- Identify technical risk and seeing technical issues firsthand.
- Be eyes and ears for the vCIO by mastering the environment and making recommendations.

Developing a Standards Library

The first part of technical alignment is maintaining a Standards Library. Without standards and best practices, an onsite alignment visit would not make sense. It would be near impossible to come out of it with usable information for the vCIO. A standard or best practice can be broken down into three individual components.

- **Question:** These should be objective and have a yes or no answer. Questions should not be open to interpretation.
- **Why are we asking:** Why you are asking this question justifies its reasoning to the client. If the customer comprehends the business impact, they are more willing to accept the recommendation.
- **How to find the answer:** Assessments check hardware or software for particular configurations. Rather than assume the TAM is aware of how something works, document steps to complete this task. It is best to cite your source on why you decided on that method of standardization. Include a URL to a manufacturer or vendor page describing the preferred configuration.

Certain aspects of each visit should have a clear definition when performing an assessment. These are concerning what is audited as well as its performance. A standards visit includes the following:

- **Standards should be defined:** Define standards and best practices before the first onsite visit. Manufacturers and vendors often supply best practices for their products. Examples include Windows Server, Exchange mailboxes, or a UPS device.
- **Technology or Compliance:** When developing standards for onsite assessments, focus on technology or compliance. Technology standards include best practices for configuring and monitoring technology. Compliance determines whether the client is within acceptable parameters for private or government regulations. Technology and compliance play off and depend on each other.
- **Elements that should be inspected:** The client is relying on the TSP to assess their technology. They determine what needs improvement and make recommendations to a decision maker. Inspected items are what clients are counting on to keep them compliant.
- **What is considered healthy:** Technology assessments decide what is healthy in a customer's IT environment. Elements of the assessment that are not aligned with standards must generate recommendations to the vCIO. The customer is relying on this information as part of a service commitment to them.

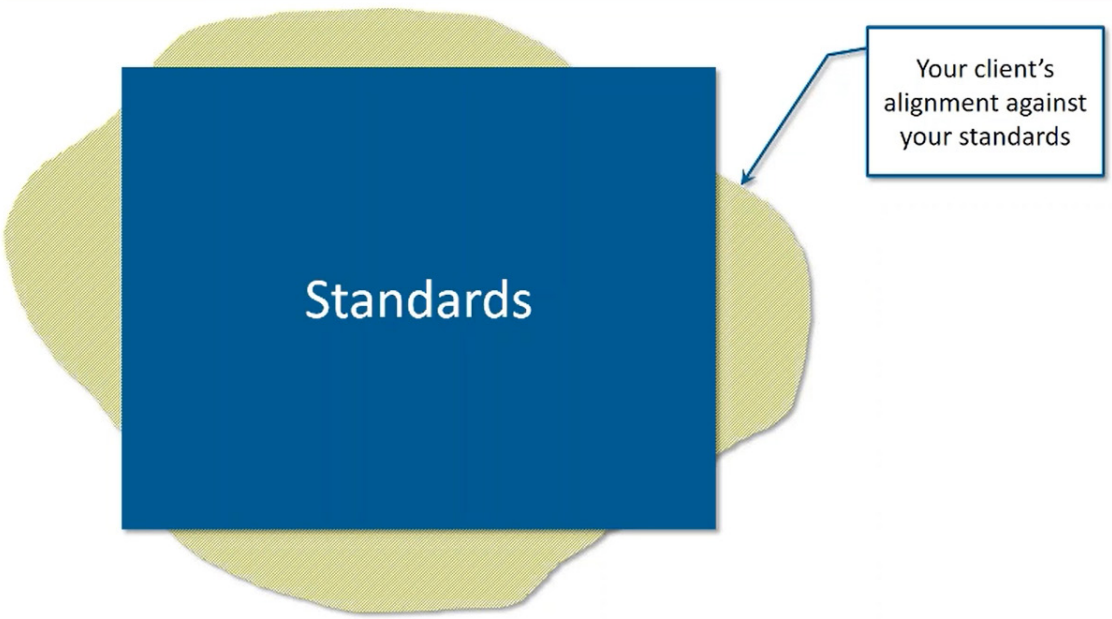
On the back half of TAM is technical alignment. This is the process of assessing customers and aligning technology against defined standards. This part is as, if not more, important than developing standards. Creating a set of standards without performing reviews would be irrelevant in the alignment process. It will be a waste of TSP resources and a severe letdown for clients.

- **Standards are the definition:** Alignment is a process of assessing how a customer's environment is versus how it should be. The core responsibility is marking items aligned or misaligned and passing information to the vCIO. Company standards are the definition for this process. Without them technical alignment is irrelevant.
- **Technical Alignment is objective:** Performing technical alignment of customer's technology is an objective analysis. Standards formatting dictates an answer of 'yes' is the rule and not the exception.
    - Good example: Is the system partition at least 40GB in size?
    - Bad example: What size is the system partition?

Elements Of A Standard

Standards consist of many elements and cover a range of categories. The development process requires these considerations:

- Define your "box". The diagram below is known as the box and blob model. The blob represents a client's technology environment and their alignment against company standards. The box indicates predictable results (standards). The box is an indication of technical alignment necessary for Technology Success.



The "Box and the Blob" model.

- It is important to know which components to inspect in an IT environment. Not every item needs a standard, but prioritizing some over others is essential.
- Certain items must be within designated parameters to align with company standards. Standards and best practice definitions dictate what to consider healthy.
- 'Why are we asking' and 'How to find the answer' is good information to have. Creating a standard without reasoning would not make sense, waste time, and be of no value to a client.
- Downtime, loss of productivity, and opportunity cost are associated with misaligned standards. Each of these examples is a business risk. Business risk is an impact on daily operations while technical risk centers around IT problems. Standards must align with business risks and not technical misalignments.

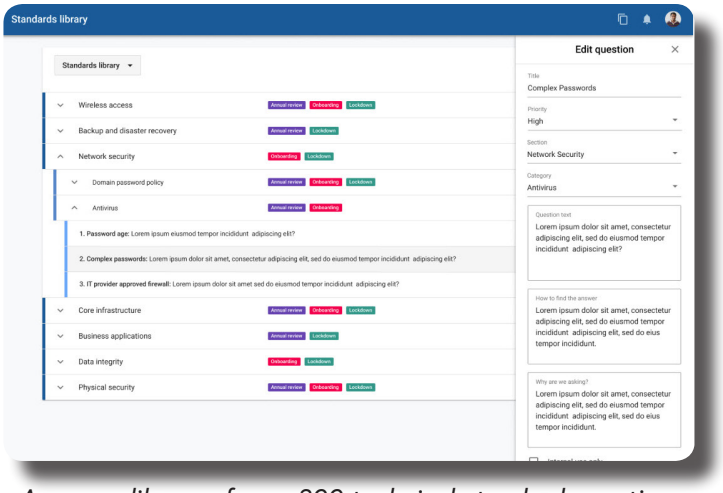
Standards and their impact on business and technical risk set their prioritization. Concrete parameters keep guesswork minimal and save time for a TAM performing a review.

- Create categories for standards ranging from email to servers to business applications.
- Specify questions for what you are evaluating to determine if it is or is not out of alignment.
- Focus on the priority of business and technical impact.
- Be specific when deciding on what to test.
- Set a frequency rule for standards like monthly or quarterly.
- Do not leave room for interpretation and create objective questions in a yes/no format.
- Be sure configuration items are important enough to include in standards alignment.
- Why a standard exists is important information to relay to your team and the client.

Developing standards for an IT environment requires a starting point. The examples below are not a definitive list, but give insight on assets that require attention.

- Patch Management
- Windows Servers
- Cloud Services
- Desktops
- Line of Business Applications
- Backup System
- Switches
- Firewalls
- Routers
- Antivirus
- Email
- Power Management
- Disaster Recovery
- Wireless Access

Getting Started With Standards



Access a library of over 300 technical standard questions or even create your own!

It may be challenging to locate a starting point in the standards and alignment process. It is best to concentrate on priority areas. There are elements to consider and the list below assists with choosing where to begin.

1. Stakeholders, vCIO's, TAM's, and Service Desk have valuable input. Form a Standards Committee that meets often to create, change, and remove standards.
2. Plan Standards Committee meetings a year in advance. Ensure they are set on the calendar and resources can dedicate proper time.
3. Define a recurring meeting schedule for the Standard Committee to meet. Keeping best practices up to date requires constant attention.
4. High-impact areas address the customer's immediate needs. Preventing reactive service issues and lowering noise will contribute to customer success.
5. It takes time to develop and refine standards into a format that covers diverse areas. Make your initial standards functional, then concentrate on refining them over time. They will continue to evolve as technology and a clients' needs change.

An important note about standards is they are a living, breathing rule set. Standards change over time from new technology, processes, and procedures. Reviewing standards at least once per year keeps them up to date as the industry shifts. Learn from your mistakes by rolling these variations into your standards library. Small improvements over time will lead to big changes.

Business Impact and the Customer

Every decision has an impact on a customer's operations. Neglecting the installation of software or no viable offsite backup are examples. Standards development from a Standards Committee maintains assessed items delivered to the vCIO. It is more important to develop quality standards over quantity. As with everything else in a TSP, there is a process.

Defining Your Standards

It is hard to believe a majority of technology used today is a product of standardization. Without it our lives would be more frustrating. Standards build upon old methodologies and improve them for efficiency and cost. What is the formal definition of a standard?

> ***standard***
> *noun stan·dard \ 'stan-derd *
> *Definition of a standard: something established by authority, custom, or general consent as a model or example.*

Standards prevent confusion, inefficiencies, and unnecessary delays by reducing variables. A great example is the Phillips head screw tip. The cross-shaped pattern is universal and anyone can make a Phillips screwdriver.

The Anatomy of an IT Standard

Standardizing a customer's technology without referencing a regulatory body is difficult. Standards modeled on best practices are a method to show customers how the industry operates.

Bad Examples

- It's the way things have always been done.
- Steve from accounting knows a guy who does it this way.
- This is how Microsoft said to do it 12 years ago.

Mock Conversation

Technician 1: When setting up a server as a virtual host, uplink all Ethernet cables to the switch and configure them independently.
Technician 2: Why?
Technician 1: That's how Microsoft says to do it.
Technician 2: Can you show me where that's documented?
Technician 1: Um… no.

Handed down knowledge may use information no longer relevant. Following transmissions cause loss of the original solution. Personal opinions, shortcuts, and misinformation trickle down with each passing message. A manufacturer will revise best practices when their product or service changes.

Good Examples

- Standards referenced from regulatory bodies including the National Institute of Standards and Technology (NIST) and the International Organization for Standardization (ISO).
- Vendor-specific from Microsoft, Cisco, HP, Dell, Datto, and Symantec.
- Third party vendor-neutral organizations like CompTIA and the Payment Card Industry Data Security Standard (PCI DSS).

A prepared IT partner showing awareness of industry trends will earn a customer's trust. Rather than assuming, always reference an authoritative body on best practices.

Mock Conversation

Technician 1: When encrypting devices for security be sure to use AES 256 bit as a minimum.
Technician 2: Why?
Technician 1: It's recommended as a best practice by NIST in their FIPS 197 document regarding the Advanced Encryption Standard (AES).
Technician 2: Can you show me where that's documented?
Technician 1: Sure, you can obtain it directly on the NIST website under FIPS 197 or in our document management library.

The table below shows examples of security-based standards centered around password policies. Each is broken up into four columns: Name of the standard, what the standard addresses (question text), the justification for the standard (why we are asking), and how to configure settings after vendor best practices.

Name	Question Text	Why Are We Asking?	How to?
Organizational Password Policy	Is a secure password policy in place?	A secure password policy ensures security and integrity of company data. Elements that comprise a secure password would be length, complexity, aging, reuse, authority, and password security.	Best Practices for Enforcing Password Policies https://technet.microsoft.com/en-us/library/ff741764.aspx
Password Timeout Policy	The password policy denies future logins for a set period of time after a specific number of failed attempts?	It is relatively easy for an unauthorized user to try to gain access to a computer by using automated software tools that attempt all passwords.	To allow for user error and to thwart brute force attacks, a setting above 4 and below 10 could be an acceptable starting point for your organization. https://technet.microsoft.com/en-us/library/hh994574(v=ws.11).aspx
Inactive Session Timeout	Inactive user sessions are automatically locked after a designated period of time?	Locking inactive sessions after a designated period of time prevents unauthorized access to a workstation or server and any resources on the network.	https://technet.microsoft.com/en-us/library/jj966265(v=ws.11).aspx

Yes or No, but not Maybe

A TAM performing an alignment review has two options when deciding if a standard is in compliance: yes or no. A customer aligned with a standard is 'yes' or 'no' if not. Avoid using 'maybe' because standardization is not open to interpretation.

For example, a question phrased "How much free space is left on the C: drive?" is open-ended and should be worded like "Is there at least 20% free space remaining on the C: drive?". Setting standards as a yes/no option remove any guesswork and give a definitive answer. Software systems like myITprocess features this style of standards alignment.

Lastly, define standards as if they are in alignment like "A battery backup unit is plugged in and operational?". Questions like these have a 'yes' answer because standards should align to the desired outcome.

Standards, Alignment, and Technology Success

Standards and alignment are necessary to build a successful Technology Success Practice. The vCIO and TAM roles are integral to creating the separation which differentiates you from the competition. Standards and technical alignment will change the landscape of performing assessments.

- Best practices reassure customers of a baseline to compare against when making recommendations.
- Standards will impact all areas of the TSP: Centralized Services, Service Desk, and vCIO. All delivery areas will involve themselves in developing standards for technical alignment. Therefore, reactive and proactive services will affect them.
- The institutionalization of knowledge will create consistency across all clients. Aggregating the knowledge held by each employee into a repository prevents fragmented service. Support and alignment of best practices among clients become consistent.
- Reactive service will be a victim of standards and alignment by reducing noise. Resolving problems that cause reactive tickets is a primary goal of the process.
- Technology Success Providers that provide World Class service are few and far between. Implementing the standards and alignment process is the differentiator from competitors.

Technical Alignment

Standards are the definition of the Technology Success Process. Technical Alignment is the ongoing analysis of a client's technology against company standards. Assessments performed by the TAM mark a standard either aligned or misaligned. It is also their responsibility to add supporting detail to develop more standards.

Alignment Cycle

The frequency of performing alignment must be on a regular schedule. The ever-changing landscape and evolution of information technology demand constant attention. The Standards and Alignment process is never completed and continues to change. A TSP adapts to an alignment cycle as standards change.

- Alignment will change over time and more than expected. Moves, adds, and changes cause the process to be ever-evolving like break/fix issues.
- Check categories on a defined schedule, especially risk-based or frequent failure occurrences. Perform a frequency update if you feel items need to be checked more or less in a given year.
- Discuss alignment with clients to reinforce the importance of their business conforming to standards. Keeping them updated makes recommendations easier to process when they are well informed.
- Use alignment to drive Strategy, allowing the vCIO to focus on business issues and growth.
- Set targets for reviews, analyzing metrics, and determining the completion rate to meet obligations.

Getting Started With Alignment

Like creating standards, finding a starting point for alignment may seem difficult. The trick is to start small and work your way up. The process takes effort to put in place and needs time to acclimate. This is why input from other delivery areas and Standards Committee meetings are important.

- Choose core clients and ensure your relationship with them is in good standing. A client with a strong relationship will support the changes that are coming into effect. Include noisy clients to reduce the reactive support burden on Service Desk.
- Schedule TAM meetings at least one year in advance. Allowing the client to be aware of this obligation stimulates preparedness.
- Perform TAM assessments on site and use a full day. A remote analysis is possible in extreme cases, but the onsite visit shows commitment. A physical presence confirms visual parts of the assessment.
- Keep the client involved and show them what you are doing onsite. Keep the discussion small and talk about your findings. Suggest forwarding more complex items to the vCIO for review.
- Make the client accountable for your findings by discussing the problem. Having a customer aware of the issue transfers liability to them and forces them to take action.
- Provide feedback to the Standards Committee when a standard is not valuable.

Effects of Technical Alignment

Standards and Alignment does more than reduce noise and increase monthly recurring revenue. The process will make delivery areas more efficient by changing information and workflows.

- Tribal knowledge becomes company knowledge, getting information down on paper. Best practices become standardized and known throughout the company and clients.
- An objective view of technology eliminates the "versus for opinions" - meaning how something is set in its way and not debated.
- The organization of tiny details into something of use. This narrows down the topics for the vCIO to discuss with clients.
- Frees the vCIO to focus on business impact for the customer. Otherwise, the vCIO finds themselves performing job functions other than impact and strategy.

Feedback from TruMethods members describes the success achieved through standards and technical alignment. Implementing the framework and following the Technology Success Process, they have transformed into a TSP. Some have even shared what common components they implemented to deserve such triumph.

- Standards are alive in their organization and are part of the rhythm of daily workflows.
- The Framework streamlines the process and creates accountability.
- Metrics like reviews completed or summaries delivered measured to look for improvements.
- Tags and frequency are of common use in the myITprocess software. A TAM can track standards and completion status.
- Virtual CIO leans on alignment to drive strategy with each client.
- Everyone understands the Essence of the TAM and vCIO roles and how they impact MRR, AISP, and RHEM.

Developing standards and aligning technology is the keystone of a World Class TSP. Standards impact all areas due to institutionalized knowledge and delivering Technology Success. Alignment is how delivering value lowers reactive noise and increases margins.

Roles and Responsibilities

The TAM has roles and responsibilities like any other member of the services team. It is essential to define their job function to prevent overlapping other delivery areas.

1. Proactive services
    - Alignment against company standards and discovering technical risk is the primary focus. Regular onsite assessments create a proactive approach to servicing technical needs.
    - Verifying Centralized Services tools, monitoring, and configurations are working.
    - Establishing a technical relationship will let the TAM communicate from a hands-on level. TAM interaction gives the customer a heads up on what recommendations they may pass on.

2. Perform regular alignment
    - Have alignment visits on a regular frequency. A common method of determining visit count depends on monthly recurring revenue. A customer paying more may indicate a greater need for frequent alignment reviews. A minimum starting point would be at least once per quarter.
    - Review meetings with the vCIO after completing onsite reviews. Using the findings of a review allows both roles to form a consensus on recommendations.
3. Onsite versus remote visits
    - Scheduled onsite visits are preferable to remote assessments. Building a customer's trust requires face to face contact with end users. Seeing a TAM onsite reassures them the TSP is delivering on their promise.
    - Alignment reviews completed via remote methods are doable. While it is always recommended being onsite, remote work is possible under certain circumstances. Clients are expecting an onsite resource for this type of work.

4. Full days versus partial days
    - A full day dedicated to a customer's onsite assessment is necessary. Undivided attention assures them prioritizing others is not occurring during this visit. Half days short the customer by not allocating enough time to perform an assessment. Using half days to schedule many visits creates a time crunch that will not benefit the TAM or customer.
    - Schedule onsite visits one year in advance. The client is then aware of the TAM's arrival date and time.
5. Reactive Services
    - Complete scheduled reactive tickets as assigned while onsite. Some tickets need an onsite to resolve and it is best to schedule the work while they are there. This will prevent unnecessary onsite visits by condensing them into a single onsite.
    - Perform simple implementations like upgrading software, connecting a phone, or installing a printer. Scheduling small moves, adds, and changes while onsite is more efficient than a separate project.
    - Train end users to use the Service Desk even while the TAM is onsite. Scheduled implementations and tickets are a priority once the risk assessment concludes. Unsolicited issues brought to the TAM may pull them away from other tasks. Showing users how to call the Service Desk will prove they can expect a timely resolution.
6. Develop and maintain technical knowledge of client environment
    - A TAM develops and maintains knowledge of a customer's technical environment. These include the hardware, software, and cloud services. Staying updated provides valuable insight to the other delivery areas.
    - Technical configuration is key to providing proactive services. Well-documenting the configurations of technologies allows for easier implementations or reconfiguration.
    - Business application support and warranty status should be well documented.
    - Keeping vendor relationships active allows the TAM to contact the right vendor at the right time. Bypassing general support when necessary and accessing top-tier support is more efficient. A dedicated account manager or technician with a vendor gets issues escalated faster.
    - Daily technology use is fundamental to the customer's business success. Using technology

provides recommendations to merge, expand, or cut waste.

7. Create a document and information repository to consolidate knowledge. Document management simplifies updates and accessibility for team members. All service delivery areas benefit from a central repository.

A Day in the Life

When a TAM goes onsite, what is the process like? What happens first and what happens last? This section will give a short breakdown of what a typical day looks like for a TAM while onsite.

- **Morning meeting with the client (15 minutes)**
    - A short meeting should take place to cover basic items before the TAM begins their daily assessment.
        - What items are on your list that you need to bring up with the decision maker?
        - What items are on your customer's agenda that must be mentioned?
        - Are there any other discussion points to mention while the morning meeting is taking place?
    - Discuss what you are there to accomplish and which tickets need completion.
    - Help the customer navigate Service Desk requests, ongoing projects, and recommendations by the vCIO during their last meeting.
- **Complete proactive tasks**
    - Complete your list necessary for standards alignment by finishing checklists and best practices.
    - Perform any maintenance items required to stay proactive.
    - Check Centralized Services tools to ensure they are functioning and test if necessary.
- **Complete reactive tasks**
    - Complete scheduled tickets while onsite.
    - Complete scheduled moves, adds, and changes while onsite.
    - Complete any reactive tasks at the conclusion of the full alignment review.
- **Afternoon meeting with the client**
    - Give a summary of your work completed to the client.
        - How much of the assessment was completed?
        - How many scheduled tickets were completed?
        - How many moves, adds, and changes were completed?
    - Note which maintenance was completed.
    - Inform customer of any unresolved items moved to the service desk for follow up.
    - Tie up any loose ends, answer questions, and confirm next onsite visit day and time.

Action Items & Follow Up

Once the alignment visit concludes, there will be action items to address. Though the TAM is technical and able to solve issues onsite, their priority is the alignment review. The delegation of these action items goes to the appropriate delivery areas.

Virtual CIO

- Have a post-meeting follow up to discuss the alignment visit and pass information discussed with end users.
- Make recommendations for misaligned technical items.
- Note which technical items were addressed while onsite.
- Recommend the addition, removal, or updating of standards.

Service Desk

- Discuss technical items completed and those handed to Service Desk.
- Create tickets for issues to hand off to Service Desk and include excessive notes about the problem.
- Ensure end users are aware of the Service Desk for help while the TAM is onsite.

Professional Services

- Pass along unresolved issues from ongoing or past projects that need completion. Some issues related to past projects may be delivered to the Service Desk.
- Transfer knowledge from standards alignment to Professional Services as needed.

Centralized Services

- Verify RMM tools deployment and configuration to an established set of standards.
- Identify and recommend resolutions to misaligned RMM tool configurations.

Why this is Important

It is difficult to explain the functions of the TAM without repeating its importance. From what we know of the Technology Success Practice, the TAM is a key piece and without it, a TSP is like everyone else. To summarize why this role is important:

1. **Drives down reactive support:** A proactive role using technical alignment keeps reactive support low for Service Desk and other service delivery areas. An increase in reactive support weighs on all delivery areas in the company.
2. **Strong relationship with the client:** Maintaining a strong relationship with clients enables trust in your organization. This creates leverage, making them susceptible to recommendations made by the vCIO. An insufficient trust will cause a client to be defensive and not invest in upgrades.
3. **Intimate knowledge of the environment:** Understanding a customer IT environment configuration is integral to the TAM role. Since the TAM interfaces with the client during visits, knowledge of the environment is necessary to quarterback the information to responsible parties.
4. **True vCIO will not exist:** To deliver vCIO as intended, this role must operate and adhere to the development of standards and best practices. Recommendations are generated, handed to the vCIO, and business strategy takes over.
5. **Differentiates you from competition:** When you remove the TAM and vCIO roles, Centralized Services, Service Desk, and Professional Services remain. The latter three are services that all MSPs offer and do not separate one from the other. The TAM role adds value and stands out among competitors. This shows potential and existing clients the importance of World Class.

Before Reframing your Clients

Before you reframe your clients, there are some key items to decide on before getting all customers, and your own organization, onboard with these changes.

- Assign resources to clients and keep them assigned for consistency. The same TAM assigned to a customer for every visit creates a consistent rapport with the client. The TAM learns and retains all knowledge about a customer's environment. The client then has the opportunity to remain comfortable with their onsite technician.
- Do not worry about defining all technical standards before visiting customers. Create standards and change them over time. Isolate a handful of standards and increase the number reviewed with each visit. Leverage the skills of other delivery areas and team members for creating standards. Every delivery area affects the outcome of standards alignment and must remain involved.
- Schedule proactive time one year in advance, giving the customer ample time to plan. Preset dates allow you to manage resources if this information is known ahead of time.
- The vCIO and TAM should meet on a recurring interval and determine a schedule. Business need will dictate a frequency that is comfortable for both parties. Both roles should maintain close communication since they develop client strategy together.
- Perform technical alignment reviews on a set frequency. Aligning customers against set standards is not a one-time deal. It is an ongoing task of keeping items in check and passing information to the vCIO. Determine the frequency that best fits the client from their needs.

Implementing Technology Alignment Manager

World Class incorporates Technology Success to drive standards and technical alignment. Otherwise, you are selling services centered on convenience rather than necessity. The TAM plays an important role in customer alignment. The vCIO does not sit idle and wait for recommendations; they engage with the TAM.

TAM and vCIO are a core part of Technology Success, where the rubber meets the road. Both roles work in tandem and are crucial for moving towards delivering outcomes. Use of this process creates relationships that survive as the industry changes.

The implementation steps make some assumptions which are important to become World Class. If you have not completed the steps it is not the end of the world, but this section relates to some external resources.

1. You have made the decision to develop a Technology Success Practice.
2. You have watched all the TAM, vCIO, and Standards & Alignment training videos available in the TruMethods members portal.
3. Have already developed some standards you can put in place.
4. Ready to assign resources to TAM and vCIO, even if part-time.

Technology Alignment Manager Implementation

Integration of the TAM role may take some time and reshuffling, but the end benefit is worthwhile. It is best to ease into it since switching to a TAM role may not work out and cause more problems from the start.

Assess a Starting Point

A starting point is a key to implementing TAM because it defines the variables used to coordinate and focus resources.

- **Leverage:** What control do you have over your customers' IT environment? The ability to drive strategy and standards alignment stems from the amount of control over a client's decision making.
- **Average MRR:** When choosing to start the process, average deal size should come into play.
- **Noise Level:** Reactive service performed is a good indicator of which clients may benefit. Reactive Hours per Endpoint per Month (RHEM) is an important metric to track, especially if you experience low margins.
- **Number of clients:** Percentage of clients currently supported that would benefit from the transition. All MRR is not good MRR so trimming customers hurting the bottom line might be necessary.

Review Your Client Base

Technical alignment reviews will be the norm once beginning the Technology Success Practice. Deciding factors like visits per year will come into play. A higher or lower frequency of visits and how to calculate these numbers is also a component.

- For every $3,000 to $5,000 in monthly recurring revenue generated per client, 1 site visit per month should occur. These are guidelines, but for an average TSP, this is a good indicator of where to begin.
- Decide the frequency of onsite visits using monthly recurring revenue or noise generated. Monthly revenue may not be a great indicator if clients are quiet. Those that pay the same and cause more issues may need your attention first.
- The right frequency may take time to develop so there is no need to perform it all at once. Identify your top clients, what you can do for them, and aim for this spot.

Agreement Chart

Working days available per TAM comes into play when assigning onsite visits. It is impossible to schedule a TAM to be onsite for more days that are available, so figure this out a year in advance.

TruMethods Agreement Chart

Customer Name	Sales Rep	VCIO	Technician	Days	Seats	Servers	GB	Monthly Revenue	Cont Date	Exp. Date
Acme explosives	Gary	Bob	Jim	12	35	2	200	$ 4,000.00	1/10/2013	1/10/2014
Tesco	Gary	Bob	Tom	12	22	1	100	$ 2,500.00	2/15/2013	2/15/2014

Example of an Agreement Chart

- Use an Agreement Chart to assign days to clients for each TAM.
- Calculate onsite capacity per resource by subtracting non-working days from total days. A rough estimate would be about 220-230 days per year.
- Understand your total capacity in days and your total commitment to clients.

Prioritize Your Clients

- You may not have enough resources to cover every client at the start, which in a way, is a good problem to have.
- Use the MRR Evaluator provided by TruMethods to find your good accounts.
- Focus on good accounts and converge your energy there.

Technical Alignment Assessments

The TAM performs alignment reviews on a frequency determined by factors like MRR and RHEM. Monthly recurring revenue and resources available can calculate the rate of onsite visits.

Schedule of Alignment Visits

- Schedule visits one year in advance to provide ample preparation time.
- All visits need to be onsite at the customer's location and not performed in a remote capacity. Face to face interaction with the client maintains a positive business relationship.
- Schedule full day visits to ensure the TAM assesses all areas.
- Assign clients the same TAM for the environment and end-user familiarity.
- Schedule visits using a shared calendar system to schedule around your assessment days.
- Notify your clients of their schedule and when you will be onsite, even if pre-planned.

Reasonable Goal Setting

Each visit requires setting reasonable goals and not attempt to overwork available resources. Initial visits need more time to inventory and label equipment. There is only so much you can complete on your first visit.

- Work through and complete an alignment review with myITprocess. The software application is for alignment reviews and vCIO interaction.
- Use tags (myITprocess) to highlight high impact areas and which areas to give priority. Over time these may change.
- Set quarterly goals for each completed category and track them using metrics. Tracking the completion of categories allows making adjustments to increase the efficiency of reviews.
- The TAM and vCIO should meet to discuss findings, changes, and ways of improving the process. Other delivery areas can join in for perspective. For instance, the Service Desk Coordinator can assess if meetings are decreasing RHEM.

Review clients and assign days to visit customer locations. It is best to get an idea of which clients will work using the MRR Estimator in the member's portal for TruMethods. Setting an internal schedule of resource hours is easier with an agreement chart. Segment the vCIO and TAM and how many days are available. Assign resources and schedule full day onsite assessments one year in advance. Set goals and track implementation of your standards.

Rhythm For vCIO & Technology Alignment Manager

TAM and vCIO need a meeting rhythm to discuss client relationships, client health, and open issues. Because the roles work together there is a necessity for both to stay on track towards Technology Success.

- Meet to review clients and how their technical alignment and business impact stand. It is best for the vCIO and TAM to understand how decisions are affecting customers.
- Discuss the client's perceived value of Technology Success. A client should understand the necessity of technology and the importance of uptime.
- Always discuss ways to improve the process. Inefficiencies leak into the practice to discover and correct these issues.
- A positive relationship is beneficial, but improving the partnership is never bad. Always talk about ways to keep the relationship strong and improve where needed.
- Address misalignments on every customer assessment. Not all customers are created equal and may need a custom solution.
- Discuss open issues that will put stress on the relationship or alignment. Bring everything to the table and do not let issues linger longer than they should.

Understanding the TruMethods Framework

TruMethods methodologies are the foundation of a Technology Success Practice. The TruMethods Framework explores development a World Class TSP. To grasp the concept of TSP, World Class, and the delivery areas, it is best to start from the beginning.

Anatomy of a World Class TSP

A World Class TSP does not form overnight. Developing "your company way" takes time, hard work, and dedication. There are certain qualities a World Class TSP must adopt to be successful.

- 2-4x industry-average margins
- 50% more service revenue per employee
- Consistently adding new Monthly Recurring Revenue (MRR)
- Delivering only high-quality support
- Setting & achieving financial goals

Achieving the right goals needs the right expectations. World Class delivery demands rebuilding your service delivery structure from the ground up. Analyzing metrics, strong sales, and end result focus are aspects of a better business. A staunch approach will be your guide to executing this plan.

TruMethods defines the customer price commanded per user as the All In Seat Price (AISP). The average MSP prioritizes reactive tasks, causing low margins due to low AISP. Inconsistent sales processes add low-margin Monthly Recurring Revenue (MRR) and result in downward price pressure and low customer leverage. Insufficient leverage over a customer will result in their decision to be less proactive. Mastery of the delivery process, sales, and support are key factors in gaining command and staying on top.

Qualities of a World Class TSP

There are five essential qualities that every World Class TSP has in common. Unlocking those valuable secrets can prove how any MSP can become a Technology Success Provider.

Business Planning

Staying afloat in a sea of tickets and buried in reactive work has become an overwhelming task. These factors prevent an MSP from creating a more effective business plan. This is the exact reason why a better process needs to be in place.

Business planning is the leading indicator of success for a successful company. IT providers need more than a plan to increase monthly recurring revenue; they need a process to turn those goals into reality. Service delivery and customer retention rates suffer without an efficient process. An effective process is necessary for all TSPs regardless of size.

Many IT providers do not know how to create a business plan, or they do not have a system in place to serve as a framework. TruMethods offers the tools and resources to increase profit margins through business planning and other methods. Learning the right business planning process:

- Turns a vision into an actionable plan
- Aligns actions with goals
- Ensures that the team has clear priorities
- Provides a framework for discipline

Packaging And Pricing

Without the right strategy for packaging and pricing, the business will suffer in areas including sales, service, and finance. Why? Because packaging and pricing reflect the value a company offers. When pricing matches the quality of services offered, it is easier to generate leads, make sales, and maximize profit margins.

Packaging and pricing should help define "your company way." In other words, what is your key value proposition? How are customer businesses affected? These questions relate to the organization.

The worry of not generating monthly recurring revenue due to an overload of IT tickets and a rigid market is expected. What is needed is an IT process that decreases reactive costs while delivering rave-worthy client results, like:

- More productive employees
- Better morale
- Increased functionality
- Reduced risk
- Enhanced security

Only then can services be priced competitively. Many MSPs miss the core concepts of effective packaging and pricing. It is important to understand what clients:

- Needed five years ago
- Need today
- Will need in five years

Sales Focus

Many IT providers struggle to add recurring revenue to their business and are unable to charge enough for their services. To grow the company, a steady flow of monthly recurring revenue is necessary. With the right pricing, this revenue is the lifeblood of technology success providers.

Expert sales coaching helps decrease the cost of reactive services and provides the results that keep clients coming back. When clients welcome extra services, the ability to command higher prices is common. In this way, a reputation is built for quality service, which impacts the potential for IT leads and TSP sales.

There is a difference between being sales-focused and being sales-interested. Most MSPs are interested in growing their sales, but to maximize monthly recurring revenue, it is necessary to have the right process in place.

An organization does not require prior sales experience, a huge sales team, or a substantial marketing investment to increase monthly recurring revenue. But, it does require a disciplined approach. Gain a greater understanding of the key factors involved in growing sales, including:

- A repeatable process
- Focused resources
- Accountability

Process-Driven

World Class TSPs are process-driven in all areas of their business. Are you concerned your organization needs a better system for managing clients or improving sales? Successful TSPs execute an efficient IT process in the following areas:

- Business and planning
- Sales
- Finance
- Service delivery

To become a top-performing IT solutions provider, process-driven culture must be encouraged. Bring team members into the discussion and establish a process for making improvements within the organization.

A strong process has a positive impact on every aspect of the company, including profitability. Whether it is aligning clients' technology with your company standards or responding to IT tickets more efficiently, the process affects the bottom line.

One of the most vital goals should be to achieve a rhythm. Daily huddles involving team member discussions help the company develop this rhythm and implement effective processes.

TruMethods offers TSP training, equipping anyone with the information, guidance, and resources needed to create an individualized process that works. Get tips on:

- Establishing a culture of process
- Institutionalizing processes within the organization
- Developing processes for documentation

Command

Having control of key metrics and KPIs grants empowerment to reduce IT tickets and deliver the type of high-quality services clients seek. Reactive tasks would not bog down service delivery and prevent growth in profits. To gain control of the business, you must have command.

Command is a 360-degree view of packaging, pricing, service delivery, sales, and accountability. As command over metrics and KPIs increases, the business moves closer to becoming a World Class MSP.

Packaging and pricing – what is sold, how much it is sold for and who it is sold to – impact service delivery. When packaging, pricing and service delivery function cohesively within the right business model, it increases the MSP sales and profit margins. Learn more about:

- What's necessary to achieve a 360-degree view of the business
- The benefits of gaining command over the organization
- The difference between generating $100,000 and $150,000 in annual revenue per employee
- How to determine the company's unrealized profitability

The Five Delivery Areas

Within the TruMethods Framework, IT services fall into five fundamental delivery areas. Delivery areas impact pricing, packaging, sales, finance, and service delivery efficiency. Why service delivery areas?

- **Roles & Responsibilities:** Define clear roles and their responsibilities.
- **Clear accountability:** Each role knows what success means to them when they understand their responsibilities.
- **Consistent delivery:** What to expect from the team and all clients receive the same level of service.
- **Separate proactive & reactive tasks:** Unclear service delivery area tasks get muddled together and create more issues.
- **Manage cost drivers:** Increases efficiency by effectively managed costs.

Centralized Services

Centralized Services administers proactive maintenance from a central location across clients. The focus of this role is to cut reactive service requests to the support team. Reduced tickets increase efficiency, enhances end results, and builds a unique competitive advantage. Deployment of remote agents on user endpoints track potential problems. Remote Monitoring and Management (RMM) tools track agents and receive alerts for proactive resolution. Example remote agent deployments are:

- Patch Management
- Antivirus, Antimalware, Antispyware
- Monitoring & Automated Maintenance
- Backup & Disaster Recovery
- Cloud Services

Technology Alignment Manager (TAM)

The focus of this role is to adopt standards and best practices for a customer's IT environment. The technical alignment review process delivers a unique end result. Standards and best practices definition, management, and implementation create 'Your Company Way'. This creates a unique difference over competitors.

The Technology Alignment Manager is a true proactive service with standardization through best practices. It works to reduce reactive issues, identify technical risk, and provide long-term planning. Standards allow the definition of technical best practices and aligning clients against them. Reviewing them shows progress and identifies technical risk. This provides an end result that many MSPs do not offer.

Virtual CIO (vCIO)

A vCIO creates a business relationship with a decision maker. A TAM performs an alignment review and passes recommendations to the vCIO. An alignment review creates recommendations to remediate misaligned standards. The vCIO meets with a decision maker for client strategy meetings. The purpose of each meeting is to plan budgets and identify business risk.

The vCIO role is hard to master without a proper TAM process. Accurate technical risk identification reinforces the need for communication with a decision maker. It is difficult to achieve business goals when a vCIO cannot work with decision makers.

Service Desk

Service Desk provides a point of contact for issues via phone, email, and RMM alerts. It is what sets a client's expectations for service quality.

Onsite dispatch is another component necessary to round out reactive support. Issues may need physical intervention when not resolved by remote tools. Simple moves, adds, and changes like installing a printer need an onsite visit. Visits are often escalated from the Service Desk to the Professional Services team. Many moves, adds, and changes are usually unscheduled and can be expensive to do. A Technology Success Process will prevent problems and enable better planning for onsite visits.

Professional Services

Professional Services is a high-level technical team tasked with the implementation of new technology. The Service Desk handles reactive issues in a remote capacity. Professional Services performs onsite work billable for time and materials. A project manager plans for implementation of proposals upon client approval. Professional Services, for the most part, holds the highest level of technical experience. Service Desk problems requiring higher tier support are escalated here for this reason.

Introduction to myITprocess

Being a World Class TSP does not stop once you write your initial business plan, develop your first IT Standards or sell your services to a few clients. The key to continuous improvement is TruMethods' myITprocess. We have created this software to help you implement the MSP process you establish in our FormulaWon program and leverage your standards across all clients.

Standards

What if we said you could lower your ticket count, cut down on reactive work and have more time to form long-term strategic relationships with your clients? Achieving this is simple when you invest in myITprocess, a platform that enables you to create and follow IT standards for your company.

Alignment

Progress does not stop once your clients are signed and on board. IT alignment with the standards you have developed is essential to staying profitable and proactive.

Strategy

Once IT standards are established and aligned clients to them, there is plenty of time for IT strategy. Forming strategic partnerships not only benefit clients but also creates long-term relationships and increases your opportunities for monthly recurring revenue.

World Class is Simple Math

World Class can be drilled down using simple math. For instance, solving a math problem with one variable is easy. However, solving a math problem with multiple variables is impossible. In the industry, a math problem with multiple variables is present and has become complex. Variables including balance sheets, income statements, and SLAs make the math more complex than it needs to be.

Three numbers are necessary to achieve World Class, also known as Smart Numbers. Smart Numbers are used to generate efficiency, which in turn creates higher margins. When you know the math of your business and each variable it is simpler to achieve your goals. There are three simple numbers:

1. **Average All In Seat Price (AISP):** You can decide this price, but must deliver a higher level of value to command the right price.
2. **Average Monthly Recurring Revenue (MRR):** You can decide who your target clients will be and set a minimum MRR to protect your averages.
3. **Reactive Hours per Endpoint per Month (RHEM):** Your total time available going towards reactive support.

Commanding the right price and the right clients stems from having optimal RHEM completion times. Solving customer issues in the least amount of time (and putting processes in place to ensure fewer issues arise in the first place) will differentiate you from competitors and grant the leverage needed to command higher All In Seat Price, therefore maximizing your Monthly Recurring Revenue.

The Five Delivery Areas and Metrics

Leverage gained by each delivery area stems from the metrics that influence them. A breakdown of the delivery areas shows how the three simple numbers (AISP, MRR, RHEM) affect each region. Control of distinct areas gives your TSP greater leverage over your customers. It will also allow greater focus on the stability of variable delivery modules.

Professional Services (Fixed)

- Hourly rate - How much you charge customers to perform project work.
- Usage - The effective use of resources like time and technical experience.
- Outcome: Available resources control leverage and how much to charge. A backlog of project work controls the rate of Professional Services allocation time.

Centralized Services (Fixed)

- Endpoints - Number of endpoints supported and cost per seat.
- All In Seat Price - How much charged per endpoint at a client's location.
- Outcome: Deliverables provide leverage due to calculated costs associated with user endpoint management.

Technology Alignment Manager (Fixed)
- Number of Clients - Can support many clients dependent on Monthly Recurring Revenue.
- Average Monthly Recurring Revenue - Determines the amount of Technology Alignment Manager resources needed.
- Outcome: Technology Alignment Manager resources determined by Average MRR.

Virtual CIO (Fixed)
- Number of Clients - Can support many clients dependent on Monthly Recurring Revenue.
- Average Monthly Recurring Revenue - Determines the amount of vCIO resources needed.
- Outcome: Virtual CIO resources determined by Average MRR.

Support (Variable)
- All In Seat Price - How much charged per endpoint at a client's location.
- Reactive Time/Endpoint/Month - Time to solve problems per endpoint each month.
- Outcome: A lower RHEM provides leverage to command a higher AISP.

The TAM and vCIO are responsible for driving down noise generated by end users. Noise refers to the number of tickets handled by the Service Desk and the amount of time required to solve them. Standards, alignment, business impact, and strategy assist in suppressing reactive issues. Implementing new technology generates non-recurring revenue. Professional Services assists in noise control when implementing approved vCIO recommendations.

The TAM and vCIO are important in controlling the Support variable. Service Desk must control user requests, alerts, and escalations. Otherwise, reactive issues leak into other delivery areas and decrease effectiveness. The noise that spreads across every role causes inefficiency due to misallocated resources.

Action Plan for Managing Outcomes

Managing outcomes is a process that takes time and requires many steps. Becoming World Class does not happen overnight and needs time to mature. The action plan is a list of items needed to differentiate from competitors.

Develop & Implement Technology Success

World Class status requires the development of a Technology Success Practice. Standards, alignment, business impact, and strategy must be in full effect to benefit. If RHEM is high, this may be difficult. Setting the action plan in motion requires the right discipline.

Right Clients, Right Price

Finding the right clients at the right price will be difficult. Customers need to buy into your vision, pay the right price, and use the right amount of services. Otherwise, they may not be the right fit. The right clients understand motives and how technology affects their business. These clients generate higher margins, hire the best people, and develop the right process for World Class results. All services may not be for everyone, even if this means dropping clients that do not align with your vision.

Building Strategic Relationships

Virtual Captain Obvious (vCO) is a common role used by IT service providers today. A client has a problem, it gets fixed, and you do not hear from them until another issue occurs. This model does not generate monthly recurring revenue nor build a strategic relationship. Building a strategic relationship carries more weight than a trusted adviser can offer. Benefits include Business Impact and Client Strategy through Standards and Technical Alignment.

Inventory Of Time

A team has a limited amount of time available to deliver services. Calculating RHEM will show how much available time reactive services use. Time left over is what is available to perform Centralized Services, Projects, TAM, and vCIO. Leveraging fixed areas provides more resources to help suppress variable activity. Understanding how RHEM affects business is key to achieving World Class results.

Unleashing Technology Success

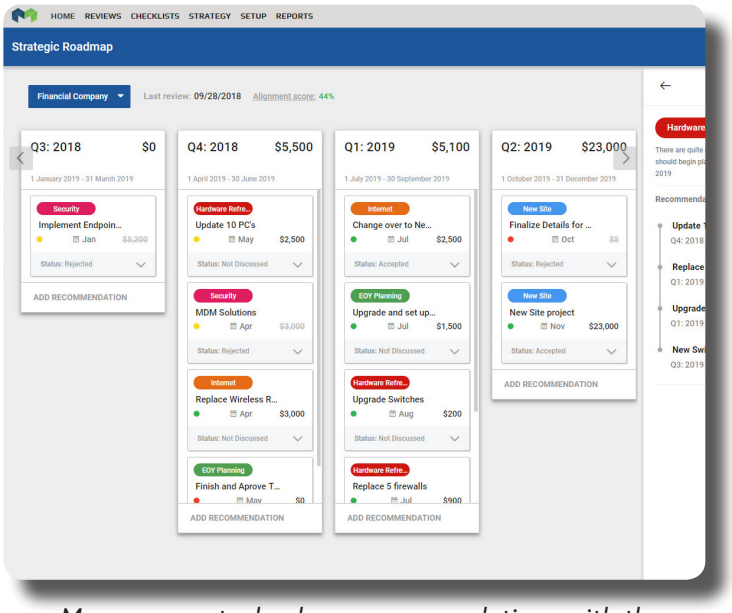
Technology Success is building a competitive advantage in the marketplace. It teaches the most important piece to make changes and differentiating from the competition. Standards, technical alignment, business impact, and strategy create separation from other MSPs.

The Five Delivery Areas

The five delivery areas present the core services to offer superior service. Each area consists of fixed or variable controls that balance service delivery and the effect on margins. Commanding the right price and obtaining the right clients boils down to proper service delivery structure.

Technology Success Culture

Technology Success Culture defines how customers perceive their quality of support. A positive culture will radiate and make a positive impact on customer satisfaction. There is more to a TSPs Technology Success Culture than vCIO. Parts of the system will fail without proper balance. A Technology Success Culture revolves around standards, best practices, and processes. Although a TAM is central to technical alignment, they are not alone. Service Desk, Centralized Services, vCIO, and Professional Services work together to create a World Class culture.



Manage your technology recommendations with the myITprocess Strategic Roadmap

Onboarding is the first step towards customer technical alignment. It uses base-level standards implementation to get clients added to a Professional Services Automation (PSA) system. It also includes deploying remote agents and completing documentation. The onboarding process is not designed to align your customers from day one. It introduces a gradual alignment increase with each onsite visit. Analysis paralysis will set in if attempting standards alignment all at once. When excessive options are available from the start, actions are never taken.

Service Desk

The Service Desk uses real-time updates to realign customers on demand. A trouble ticket entering the queue gets solved using defined technical standards. Providing fast and efficient service will cut down on RHEM. Misaligned standards should pass to a TAM as consideration for the next review. Recurring issues are what the Standards Committee uses to create or update standards.

Centralized Services

Centralized Services performs maintenance, monitoring, and automatic resolution on a grand scale. Use of RMM tools contributes to the success of this delivery area. An effective configuration of remote tools alleviates problems before they reach the Service Desk. Deployment, configuration, and retirement of tools are standards-aligned by the TAM.

Technology Alignment Manager

The TAM recommends solutions to a vCIO from technical alignment reviews. Standards alignment is a process needing regular attention as a customer's technology changes. Changes in complexity and size will have a factor on standards alignment. Bringing revisions to the attention of the vCIO is important to the business relationship. Without alignment information, A vCIO is unable to connect specific business needs.

Virtual CIO

The vCIO is the gateway to a customer's IT operating environment. Alignment information from the TAM determines how to rank the best use of resources. Presenting strategy in a technology roadmap will lead to new projects. Projects are a permanent resolution to technology misalignment.

Professional Services

Aligning standards through projects is the Professional Services delivery area. Various situations exist for breaking out types of project implementation.

- **Catch up:** Alignment steps performed while already working on something. This occurs during new customer onboarding when immediate standards alignment is necessary.
- **In scope:** Items marked as aligned or misaligned during a scheduled onsite visit. Performed in real-time with no extra costs required.
- **Out of scope:** Items that need a cost because they are not part of a scheduled assessment. This occurs when alignment checks take place during non-business hours (weekends, holidays).
- **Opportunistic:** Resolving standards alignment as part of a project and bundling it with labor in progress. If a project to install a new server offers the opportunity to upgrade the switch to gigabit, complete both on the same visit.

How The Delivery Areas Work Together

Centralized Services

Centralized Services carries the responsibility of proactivity. Using RMM tools to deploy agents to remote endpoints monitors irregularities. Low disk space, low memory, or failing hardware are examples of alerts that may trigger. Deploying network nodes to check system activity help troubleshoot issues before they happen. Configuring agents to alert the Service Desk early is a characteristic of great support.

Technology Alignment Manager
Centralized Services will keep documentation and maintain RMM tools. Notifying a TAM of changes is important and keeps customers aligned.

- Notifies the TAM of changes with remote agents or tools and updates required documentation.
- Informs TAM of any issues before working on a customer's account.
- Is the "eyes and ears" on the ground for a TAM.

Virtual CIO
Constant issues or a clean bill of health are items the vCIO needs to be aware of at all times. The CS team reports issues to the vCIO for potential phone calls or meetings with the customer. Being prepared reassures the customer that the situation is under control.

- Keeps vCIO apprised of all technical situations to communicate with the customer.
- Provides trend reports identifying issues that may need recommendations to the client.

Professional Services
Professional Services may work on projects after hours or spanning many months. Communication raises awareness of agents no longer needed.

- Involvement with project kickoff meetings and plan monitoring events.
- Changes to RMM tools need communication with Centralized Services to prevent false alarms.
- Remote agents needing reconfiguration should be coordinated with Professional Services during project kickoff.

Service Desk
False alarms can wreak havoc on a Service Desk and tie up technicians from resolving real issues. When issues with RMM tools send false positives, the Service Desk becomes inundated.

- Notifies Service Desk of issues causing false alarms.
- Mutes or disable false positives to prevent constant alerts to the Service Desk.
- Over communication is essential during a crisis.

Technology Alignment Manager

A TAM uses frequent auditing to align a customer's IT environment to a set of standards. This is accomplished by implementing standards and making recommendations to the vCIO when out of alignment.

Professional Services
While the project team is implementing new technology, TAMs can be called upon for technical help as needed. Technical assistance provided by a TAM should not be a common occurrence. This benefits the customer and TSP by preventing work stoppage or bottlenecks.

- Transfer of knowledge from standards alignment to the project team.
- Assists implementers with technical work as necessary.

Virtual CIO
TAM and vCIO work in unison to align customers against a set of standards. TAMs assist with creating standards and attempt to achieve technical alignment. Misaligned items sent to the vCIO are prepared for a customer review. The TAM communicates with end users from a technical perspective and not through client strategy.

- Develops standards for technical alignment, audits, and recommends options for remediation.
- Is the "eyes and ears" on the ground during onsite visits.
- Responsible for creating, managing, and maintaining standards and technical alignment.

Centralized Services
RMM tools are deployed during customer onboarding and maintained throughout their long-term relationship. It is necessary to develop standards for RMM tool deployment, configuration, and documentation.

- Verifies RMM tool deployment is configured to an established set of standards.
- Identifies and recommend resolutions to misaligned RMM tool configurations.

Service Desk
During a TAM onsite alignment visit, end users may ask for technical help. Unless time is already set aside, the customer will need to contact the Service Desk.

- Onboarding provides the opportunity to give training to clients on receiving support.
- While onsite, a TAM should reinforce the use of Service Desk.

Virtual CIO

The focus of a vCIO is building strategic relationships. All delivery areas communicating and working together accomplishes Technology Success. Recommendations from a TAM create the technology review used for client strategy. A vCIO should remain involved during the project handoff process.

Professional Services
A project approved by a decision maker is handed to the project team. The transfer of knowledge must be accurate to prevent scope creep. A vCIO will explain the project in detail at handoff when necessary.

- Explains project requirements, limitations, and reduce assumptions to prevent scope creep.
- Be a technical resource for planning out the project work.

Technology Alignment Manager
The TAM performs alignment reviews and passes recommendations to the vCIO. The process of reviewing improvements does not end once recommendations are in the vCIO's hands.

- Assigns alignment reviews to TAM for evaluation of IT environments. A TSP's standards determine if a customer configuration is in or out of alignment.
- Builds proposals from alignment recommendations unless a Design Desk is operational.

Centralized Services
Proactive monitoring gathers data on how IT environments operate. Information collected shows developing trends provides vital insight into being more proactive.

- The vCIO reviews reactive trends and aims for proactive resolution.
- Trends convert to standards for technical alignment in future assessments.

Service Desk
The Service Desk will review reactive trends generated from RHEM. The vCIO may review this information with the TAM during their next meeting. The Standards Committee can use this data to create new standards.

- The vCIO reviews reactive trends for proactive standards alignment.
- Relationship issues escalated immediately to the vCIO.

Service Desk

The Service Desk aims to reduce noise by solving tickets using quick remediation. Quality of service is dependent on Service Desk response and remediation time.

Professional Services
Service Desk technicians may receive support calls related to ongoing projects. The client must be aware of downtime or potential snags from the project team.

- Reports calls related ongoing projects. The Service Desk should be aware of all ongoing projects, start date, and completion date.
- Involvement during the transition from project to support.
- Escalation point for high-level technical support.

Technology Alignment Manager
Analyze trends to convert into standards is a proactive step to lower noise. Technical alignment standards reduce support tickets over time.

- Knowledge transfer prevents future problems and brings changes to the attention of TAM.
- Proper usage of the Service Desk is a necessity for normal workflow.

Centralized Services
Proactive maintenance using automated tools alleviates the pain of dealing with recurring problems. Tuning of RMM tools occurs with feedback from the Service Desk.

- Configures agents to auto-resolve issues whenever possible.
- Tuning RMM tools is possible with feedback from the Service Desk.

Virtual CIO
Delivery areas experiencing relationship problems should escalate them to the vCIO immediately. Risks to the integrity of a positive business relationship need to be a high priority.

- Escalates all relationship issues to the vCIO. When in doubt, send it to the vCIO anyway.

Professional Services

Professional Services implements hardware, software, or services. Replacing or installing new resources may resolve a recurring break/fix issue. They plan, install, and troubleshoot projects in a customer's IT environment. Once a project is complete, a knowledge transfer occurs to other delivery areas.

Technology Alignment Manager
Upon project completion, a knowledge transfer occurs between the implementer and TAM. Information on what is new, what has changed, and anything related to standards alignment is brought to attention.

- Knowledge transfer of project work occurs shortly after implementation wraps up.
- Changes to standards and technical alignment are brought to attention.

Virtual CIO
Knowledge transfer during project handoff is a key step to ensuring successful implementation. A vCIO understands a customer's environment and technology use, making them a critical resource to explain the project scope and the outcome is desirable.

- Scope, timeline, and resources needed are important factors when handing off a project.
- The vCIO is an important technical resource familiar with the customer's IT environment.
- Problems that arise during implementation need to be addressed with the vCIO.

Centralized Services
Maintaining RMM tools is key to being proactive. When a project is being implemented, Centralized Services needs to be aware of changes made. Remote agents that need installation, configuration, or decommissioning need attention.

- Notifies Centralized Services of project completion to begin the tool verification process.
- Document changes made that need tools configured, added, or decommissioned.

Service Desk
The Service Desk needs to be up to date on customer changes. When receiving technical support requests related to a project, technicians need to know where to route the call.

- Updates and document recent changes to a customer's environment.
- Support technicians must be aware of new projects and changes.
- Assists with high-level support escalations.

Introduction to Design Desk

Generating proposals and budgets are a fraction of the vCIO role. Spending too much time performing this function is not optimal for the role or customers. A vCIO does not have the time or schedule to research, plan, and write every proposal presented to a customer. Design Desk is not a delivery area but serves as a key function that helps achieve high leverage numbers.

The core purpose of the Design Desk is supporting the vCIO and Professional Services delivery areas. There are many reasons to support the five major delivery areas with Design Desk.

- Clients need changes to their technology over time. Hardware and software implemented becomes out of date and requires rejuvenation.
- Changes to technology need planning and implementation. Upgrades differ and need due diligence before a proper recommendation.
- Design Desk researches, plans, and writes implementation plans for new technology.
- Adds to client strategy by creating thought out, well-structured proposals and work plans.
- Delivery area resources have finite time: TAM performs alignment reviews, vCIO builds the business relationship, and Professional Services implements projects.
- A contribution to a backlog of non-recurring revenue helps keep Professional Services billable. Time expires after project completion. A backlog keeps NRR moving by having profitable non-recurring revenue services in the queue.

What Is Design Desk?

A Design Desk researches solutions, its business impact, materials necessary, and completion time. If a dedicated resource does not exist, the responsibility spreads among the other delivery areas. Consolidating this function will deliver on promises made during vCIO review meetings.

Some employees cannot perform this role on top of their current responsibilities. The intention of the Design Desk is to focus on research and planning of projects. This role should not be fulfilled by:

- **Sales:** A sales associate that can sell would be too expensive to take them away from selling. Someone who can sell should focus on adding new monthly recurring revenue. Their time is too valuable to design proposals and quotes. Coming across with a sales mentality will reduce trust with clients.
- **vCIO:** A vCIO cannot spend most of their time preparing proposals and must concentrate on business relationships. Not focusing on clients will prevent the generation of non-recurring revenue. The vCIO may step in to assist with research and proposal generation depending on the size of the client.
- **Professional Services:** An engineer's function is to install projects vetted by Design Desk and vCIO. An engineer's workload is billable which means every minute not billing is a loss of revenue.

Design Desk Function

To understand the Design Desk, it is best to detail the day-to-day responsibilities. The role plays an important part in the vCIO process due to constant interaction. The vCIO leans on Design Desk to generate accurate proposals with their vision for customer success.

Working With Technical Teams

Design Desk understands the technology available and how it operates in a customer's environment. A technical background is necessary to comprehend the technology recommended. On occasion, it may be necessary to consult with other technical teams for advice.

- Researching solutions may need input from Professional Services, TAM, or Service Desk. Finding the right solution for a client may rely on experience.
- The amount of time required to implement a project may be variable and not the same across clients. Technical teams may need involvement for special requirements even when aligned with company standards.
- Equipment like hardware, software, or services are not always a one size fits all solution. Consulting with other delivery areas can find the right solution for specific needs.
- The Design Desk ensures the chosen solution aligns with the customer's business goals. Solutions may be routine across customers and some will need customization.

Working with the vCIO

Design Desk and vCIO work side by side like TAM and vCIO. A vCIO handles the client's business goals and plans out strategy over the short and long term. Budgets planning 1-3 years in advance plays a big part in designing solutions. Design Desk must be aware of customer goals and budgeting when crafting proposals.

- A business case for each solution maintains technical alignment with each customer. Cookie cutter solutions work for customers who are not dependent on their technology. A customer that understands its importance requires more involvement.
- Design Desk needs to identify the area of necessity rather than creating a proposal around a specific technology. Accurate identification ensures researched solutions are designed and implemented right the first time.
- A vCIO will multi-thread and work with many clients at any given time. Design Desk must learn to meet deadlines from priorities handed down by the vCIO. This requires a non-linear work method and the ability to work on many proposals simultaneously.

Creating Project Proposals

The anatomy of a project proposal consists of many areas: detailed steps, the time required, and resources necessary. Accuracy of time and materials is important because it determines the cost of projects. Project proposals will contain at least of four sections: steps, timeline, equipment, and resources.

Detailed Steps

Designing a project plan includes every step required for a successful implementation. Listing resources, technology, and a timeline are useless without proper steps of implementation. For example, replacing a server should list all requirements before, during, and after installation. Completing steps in the right order will determine the success of the project.

Each step should include enough detail so an implementer will need little to no clarification by the Design Desk. A Professional Services Engineer possesses the skill necessary to implement each project. Customers may need certain customizations depending on their environment. Situations like this are why an up to date Standards Library must be prioritized. Each client will have use cases for technology which makes detailed steps important.

Time Requirements

Each proposal calculates the time needed to prepare, plan, install, and close out a project. Some project timelines may be standard installations like switches and firewalls. Others may need customization dependent on the complexity of a customer's environment. A timeline can split into two directions when allocating it for a project.

- Over-estimating time will see a project finished sooner than expected. High costs that deter customers from a future investment is something to avoid.
- Underestimating time will cost the TSP money by allocating resources longer than necessary. It will prevent other billable projects from starting.

When estimating time, key variables need consideration. It is best to estimate extra time should anything go wrong (scope creep), but not overestimate.

- **Project management time:** Time used by the project manager for a formal handoff between the vCIO and Professional Services team. It also includes planning the project, assigning resources, and scheduling implementation.
- **Implementation time:** Project implementation time according to the proposal. If planned by Design Desk, vCIO, and project manager, the estimated time should be enough. Even with scope creep, handling all assumptions before the start should remain accurate.
- **Standby support:** Support for small issues should be set aside after completion. Allocating time prevents rushing into the next project before others finish.

A small block of time should be set aside at the end of each project to close it out. Project closure includes customer confirmation that everything is complete as planned.

Hardware/Software/Service Requirements

Projects need hardware, software, or services. A proposal includes a detailed listing of items along with costs. Costs change over time so budget these items in advanced using best estimates. Be sure to build in markup to match your non-recurring revenue margins (30% or more).

- Hardware includes physical devices that are upgraded, replaced, or installed at a customer's location. Examples include virtual hosts, network switches, wireless access points, and workstations. Quoted hardware adds a markup to match your non-recurring revenue goals. Markup prevents losing money, selling at cost, and building a price cushion in case of fluctuations. A proposal should guarantee hardware pricing for a limited amount of time. Price fluctuations over the course of a few months could result in a loss.
- Software is anything installed from physical media or downloaded to a workstation or server. Examples include operating systems, office suites, and accounting applications. Some software used in business environments need licensing or support contracts. Extended support is a major consideration when proposing large software upgrades. Software best practices should include the following.
    - Currently supported by the manufacturer and not end of life.
    - Have a valid support contract through the manufacturer or third party.
    - Have full and proper licensing for the customer's environment (no shareware or demos).
    - No pirated or stolen software.
- Services are non-physical hardware or software and provided by a third party. Common examples are cloud services (email, accounting, ticketing), phone, internet, and payroll. Most cloud services are a subscription model and have a low monthly fee. The major benefit of a subscription model is the loss of a large initial investment. Monthly cloud services provide the convenience of off-site hosting. Proposals should compare the pros and cons of cloud services to provide a Time-to-Value estimation. Analyzing the monthly model versus the onsite/upkeep model is a great method of showing the total cost of ownership.

Resource Requirements

Resources refer to personnel, vendors, or stakeholders needed to complete a project. A project needs resources assigned to complete tasks, technical or not. Professional Services has engineers on hand that dedicate themselves to this process. They can divide resources at any time depending on the complexity of a project.

- Technical resources are engineers that install, maintain, or upgrade technology. The resource assignment matches the complexity of the project. A high-level project should involve a highly-skilled engineer. Tasks, like setting up workstations or installing software, can be delegated to entry-level technicians.
- Non-technical resources refer to no installation or maintenance of hardware or software. Projects may need an asset inventory documented or converting paper documents to PDF. In these scenarios, high-level engineers are not necessary.
- Vendors or manufacturers may need involvement with the implementation of technology. A high-level engineer may need a vendor for specific integrations or configurations.

Create Proposal Templates

Design Desk will mass produce proposals to create a backlog of work for Professional Services. Projects may follow the same format, include similar resources, and even labor. Proposal templates allow for efficient production to prevent starting each from scratch. Managing a templates library streamlines the proposal creation process.

Ordering Process

When it comes to consolidating functions in a role, the Design Desk does that. Buying technology and maintaining relationships with distributors or vendors falls under Design Desk. Consolidating responsibility establishes a single point of contact to request pricing and availability from suppliers.

- Distributor relationships provide direct contact with vendors who supply pricing and availability. Many organizations exist that supply IT products from their warehouses. It prevents searching for product pricing from third party sites. Most vendors assign an account manager to assist Design Desk with building proposals.
- Hardware purchases like firewalls, switches, and workstations can be standardized across many clients as part of technical alignment. Workstation build templates provide a quick solution without custom building one every time. Servers potentially need customization for most applications.
- Version maintenance is a factor when designing software solutions for a customer. Many software titles have transitioned to web-based versions and switched to subscription pricing. Understanding physical and cloud versions is vital when upgrading or implementing. Some cloud versions cannot integrate with on-premises versions.
- Licensing needs a higher level of understanding to interpret changes and legal restrictions. Some manufacturer license schemes are complex and have requirements before purchasing. Most third-party resellers have licensing specialists to sort out confusion with agreements.
- Gross margin on purchased hardware is a factor in non-recurring revenue. Hardware for projects should have a markup in accordance with gross margin goals. If the goal is a 30% margin, the hardware will have this added to the cost. For example, a server with a cost of $3000 should have a markup to the customer at $3900to create a 30% marginal gain. Design Desk is accountable for ensuring gross margin remains consistent across the board.

Key Vendor Relationships

Establishing and maintaining vendor relationships creates flexibility when quoting technology in a proposal. Vendor relationships allow for direct wholesale pricing from a reseller. Resellers tend to have their own warehouses and ship products direct. This strategy allows them to bypass typical processing delays through retail outlets. Vendors may even assist with marketing, branding, or training of certain products.

- Manufacturers may offer product training for servers, network equipment, or other technology. Training received from the source is well worth the effort, whether free or not. This will develop the best practices and standards for the Standards Library.
- Vendors keep technology information up to date as they develop or release. They announce public availability or even beta testing opportunities. Marketing opportunities like sponsorships or co-branding original content also become available.
- Design Desk will become the single point of contact for outside vendors. A single point of contact on the TSP side benefits both parties. A strategic business relationship forms like the vCIO and decision makers.

Tools

Proposals need an assortment of tools to create, manage, and deliver. Using tools for the sake of using them would be inefficient. It is best to use what may already be in place and work up to something that would be all-encompassing.

- Professional Services Automation (PSA) and Customer Relationship Management (CRM) tools are great starting points when drafting proposals. Customer details, asset inventory, and project history are accessible through these systems. Providing self-service analysis of client support history maintains a smooth process.
- Quotes made in a word processor or spreadsheet can be useful. Advanced quoting tools provide extra features and streamline the proposal creation process. They allow for a text description and pull product data from vendor databases. Some even include the digital signing of proposals to speed up the approval process. Tools can be costly but pay for themselves with a high turnover of proposals generated.

Managing Design Desk

Generating proposals requires discipline since it pulls in many directions at once. It is important to rank and organize tasks to prevent bottlenecks and delivery delays. Focusing on important tasks takes precedence over external affairs.

- Beware of multitasking many proposals without finishing them. It is possible to start proposals without finishing them and not meet deadlines.
    - Set a start and end date on your best estimation of completion time.
    - Block off time on your calendar to dedicate to a particular proposal.
    - Avoid interruptions to meet deadlines.
    - Do not over promise on delivery dates.
- Focus on and organize tasks after vCIO recommendations. A vCIO should decide the priority of a proposal and assign it to the Design Desk. Complete tasks on importance rather than the length of time to complete.
- Standardize miscellaneous products to push proposals through the system faster. Configurations for hardware do not need many variations. For example, choose two workstation builds and quote them on customer needs. This allows for fast quote generation and ease of ordering from distributors.

Common Mistakes

- The process has no designated role as a TSP scales upward. When starting out, the role spreads out among the other service delivery areas. As a TSP grows the role must be central to an individual or group depending on necessity. Spreading the responsibility among other roles will prevent others from performing their assigned duties.
- Design Desk has no process attached to it. Assembling proposals use any tools necessary to create a detailed project for a client. Without a process in place, Design Desk will suffer and fail.
- Too technical or not understanding recommended technology will prevent proposals becoming projects. High-level technical resources may not translate the project into intelligible business terms. Someone who does not understand the technology well enough cannot recommend the right solution.