

Building a Managed Services Practice



BENEFITS TO YOU

- ✓ Learn best practices culled from experience, feedback from successful managed service providers and industry research
- ✓ Miss the speed bumps on the road to success with managed services
- ✓ Understand what others have done to build a profitable, recurring revenue based, managed services practice
- ✓ Jumpstart your Managed Services Practice initiative, or validate what you are doing

Our **Building a Managed Services Practice Accelerator Program** provides best practice guidance on growing a profitable managed services practice within the framework of your IT Service Provider business model. The program is designed for a range of IT service providers including technology solution providers, consulting firms, systems integrators and

"This program was great! It transformed the way we look at our business."

-Alok, OH

Managed Services Providers (MSPs) who are beginning the journey or are already delivering managed services.

Based on industry best practices, the program can get you jumpstarted in your efforts, validate what you are doing and/or provide options for consideration.

We share tips and best practices developed as market leaders

and from working with thousands successful IT Service Providers and Managed Service Providers. We share experience gained by integrating their unique approaches into our deliverables. The content comes from a ground level approach. We can go into the trenches with you because we have been there.

The program is led by Len DiCostanzo, Autotask Senior Vice President and Dean of Autotask Academy. A pioneer in the industry, Len built his first profitable managed service practice in the 90's, and over the years has worked with and learned from thousands of IT Service Providers and MSP's, while helping them build their managed services practice.

The program consists of five workshops addressing key business and technical areas touched when building a managed services practice. Each workshop can stand alone but are integrated in a start to finish sequence, and includes attendee guides and customizable tools and templates to speed your go to market strategy. The sessions are delivered from the perspective of the owner, CEO and/or senior manager who realizes the importance of building and maintaining a managed services practice, and wants all stakeholders on the same page. This program can show everyone in your company how it is done. We suggest whoever attends sits in on all the sessions to get the full value of the program.

WORKSHOP 1

Defining Your Managed Services and Service Level Agreements

This workshop provides a methodology to define your portfolio of Managed Services and other IT Services, and a client facing catalog. We also provide a framework to develop Service Level Agreements (SLA) to meet the needs of your clients and prospects.

WORKSHOP 2

Pricing Methodologies for Managed Services

This workshop provides a customizable methodology for profitably price your Managed and additional IT services, including a la carte services, projects, consulting engagements and break/fix IT services.

WORKSHOP 3

Building & Staffing a Managed Services Operation Center

This workshop presents a best practice framework to build a Managed Services Operation Center to deliver consistent, high quality managed services in support of your client base.

WORKSHOP 4

Selling Managed Services to Clients

This workshop reveals a customizable strategy to sell managed services to clients first, and transition from a break/fix relationship. Selling to clients first puts hot leads in your managed services sales pipeline, and starts you on your way to earning recurring revenue!

WORKSHOP 5

Selling Managed Services to Prospects

This session presents a customizable strategy you can use to scale your managed services revenue by selling to prospects. The session reveals how to position managed services as a solution, and how to bolt managed services onto any solution you sell.

NEXT STEPS

1. Call 518.720.3500 x1201 or send an email to academyws@autotask.com for more info.
2. Autotask customers can register off the training calendar in online Help.
3. Or register off our website at www.autotask.com/academy/calendar.htm
4. Speed your go to market strategy and build a profitable managed services practice!

WORKSHOP 1 OF 5

Defining Your Managed Services and Service Level Agreements



ACCELERATOR PROGRAM

GOAL

Share best practices to define your Managed Services and overall IT Product and Services catalog and associated Service Level Agreements (SLA) that can be customized to meet the needs of your clients and the capabilities of your business.

DESCRIPTION

You want to build a managed services practice. You want to hit the ground running. How do you get started? You can start by defining your managed service offerings and organizing them into service level agreements you can sell to clients and prospects.

This session will provide a methodology to define an overall IT Product and Service catalog, with a focus on Managed Services, based on the tools you have or can acquire, what IT services you can deliver now, and the new capabilities you can build.

TOOLS

Session attendees will take away tools and templates designed to jumpstart, validate and support you as you begin to build a managed services practice or validate where you stand.

Tools and templates include:

1. A worksheet you can use to plan managed service offerings, IT Services and related service objectives.
2. A worksheet you can use to develop a Managed Services catalog for clients and prospects.
3. Service level agreement (SLA) templates you can customize to meet the needs of the business, your clients and prospects.

LEARNING OBJECTIVES – The attendee will be able to:

1. Understand where a managed services practice fits in the business model of a successful IT solution provider.
2. Apply industry best practices & standards to the process.
3. Contrast break/fix IT services delivery versus managed services.
4. Execute a methodology to determine break/fix IT services that can be automated and delivered as Managed Services.
5. Develop a process for continual service improvement.
6. Build Service Level Agreements that meet the capabilities of the business and needs of your clients.
7. Plan next step tasks to advance the process.

“This was a great program. We are a small shop in the process of switching from all break fix to a full hybrid offering Managed Services.”

- Steve, IN

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WORKSHOP 2 OF 5

Pricing Methodologies for Managed Services and other IT Services



ACCELERATOR PROGRAM

GOAL

To provide customizable methodologies for pricing managed services and other IT services.

DESCRIPTION

Now that you have defined your managed services, you need to price them so you can profitably sell to clients and prospects.

How do you determine costs for managed services? How much will you charge for your other IT services? How much can you charge? How much profit can you make? This workshop will provide methodologies to cost and price managed service offerings, and the balance of your IT Services portfolio, for profit. Learn 5 key factors to consider when pricing Managed Services, and IT services. Gain confidence pricing Managed Services, and extending this pricing model to your other service deliverables.

No more throwing darts to come up with a price, and waiting to see if you charged enough! Take this workshop and you will be confident you are selling and delivering profitable Managed Services, and other IT services.

TOOLS

Session attendees will take away tools and templates designed to jumpstart, validate and support you as you begin to build a managed services practice or validate where you stand.

Tools and templates include:

1. A worksheet to be used to develop costs, pricing and profits for Managed Services.
2. A worksheet to be used to develop costs, pricing and profits for IT services.

LEARNING OBJECTIVES – The attendee will be able to:

1. Confirm the benefits of a solid Managed Services pricing methodology.
2. Understand 5 key factors to consider when pricing your services.
3. Develop an approach to calculating hourly rates for billable staff.
4. Determine costs and profits for B/F IT services.
5. Determine costs and profits for Managed Services and other IT services.
6. Tie Managed Services pricing to SLA's.
7. Determine next step options for your consideration.

“Of all of the web-based training I’ve done, from product training to business management training, I can’t Remember a single training experience where the material was so directed to exactly what we’re dealing with.”

- Glen, CA

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WORKSHOP 3 OF 5

Building and Staffing a Managed Services Operation Center



ACCELERATOR PROGRAM

GOAL

Provide a customizable framework to build and staff a managed services operation center (MSOC), focused on your Service Desk and delivering as the IT Department for your clients.

DESCRIPTION

You have defined your IT Services Portfolio, and your managed services. Now you need to build your Managed Services Operation Center, or MSOC. The MSOC is the next generation Network Operations Center (NOC) you can build your managed services model around. Your MSOC enables you to deliver Managed Services in a consistent, automated fashion. As a result, you can meet your service level agreements in support of your client's business.

In this workshop, we define key areas of accountability and present staffing and outsourcing options. We reveal investments you can make in people, process and technology to make it happen. We present best practices you can consider to minimize your pain and time investment to get into Managed Services. We discuss the definition of a managed client configuration, and then how to on-board new clients in a consistent fashion. Begin transitioning your managed services into production so you can start earning recurring revenue!

This workshop will provide you the information needed to begin realizing the benefits of delivering managed services, and ensure you meet SLA's and drive client satisfaction.

TOOLS

You will take away tools and templates designed to jumpstart, validate and support your managed services delivery, including:

1. A managed client on boarding checklist.
2. Flow charts of processes key to success in managed services.
3. MSOC staff job descriptions.
4. MSOC diagrams you can customize.

LEARNING OBJECTIVES – The attendee will be able to:

1. Confirm benefits of building & staffing an MSOC.
2. Define MSOC client deliverables.
3. Finalize and prioritize MSOC configuration options.
4. Finalize managed client configuration options.
5. Utilize staffing best practices and alternatives.
6. Define operational processes key to success.
7. Become the 1st client supported by the MSOC.
8. Plan next steps to sell managed services to clients and prospects.

"The entire program was good information and applicable to my individual business."

- Robert, WA

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WORKSHOP 4 OF 5

Selling Managed Services to Clients



ACCELERATOR PROGRAM

GOAL

To provide customizable strategy to sell managed services to clients, or simply 'transition' them to your new offerings.

DESCRIPTION

You have defined your managed services and organized them into service level agreements (SLA's). You have confidently priced your managed services based on a solid pricing methodology. Your MSOC is ready to go. You are ready to roll out your managed service offerings!

Who will you target for your new managed service offerings? How can you jumpstart your managed services based recurring revenue stream? How do you know you are ready to scale your managed services deliverables?

This session will reveal a strategy to sell managed services to clients first. Start building your profitable recurring revenue stream by selling to clients first using tried and true strategies and tactics. Learn why client buy managed services and why you should sell to clients first. See how savings calculations can be used to generate relevant return on investment scenarios. Plus, walk away with tools and templates to minimize your time investment to get ready to sell to clients!

TOOLS

Attendees will take away tools and templates designed to jumpstart, validate and support the process, including:

1. A worksheet to build your forecast of managed services and other IT services revenue.
2. A worksheet revealing 8 ROI calculations you can use to clarify client savings achieved from using your managed services.
3. Checklist forms to be used when gathering client information to prepare to sell managed services to meet their needs.

LEARNING OBJECTIVES – The attendee will be able to:

1. Confirm the benefits of a selling to clients first.
2. Understand why clients will buy your managed services.
3. Use the ROI calculator to share the benefits of clients' using your managed services.
4. Plan and execute 9 key steps in the process to sell to clients.
5. Next step options for your consideration.

"This stuff is just unbelievable in terms of how focused it is on our real-world problems that we have to solve, which is great."

- Glen, CA

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WORKSHOP 5 OF 5

Selling Managed Services to Prospects



ACCELERATOR PROGRAM

GOAL

Provide a customizable strategy to market and sell Managed Services and solutions to prospects.

DESCRIPTION

You have rolled out Managed Services to your clients, refined your service delivery processes and tightened up your SLA's. Now you are ready to sell to prospects and add new clients. This workshop will reveal a strategy to sell Managed Services to prospects and scale your Managed Services recurring revenue stream, and pick up projects along the way.

In this workshop, we share marketing tips and methodologies you can use to position your company as the expert. We discuss how others have successfully developed a targeted audience, marketed their offerings and see how going vertical can lead to success. Position your company as more than just a computer guy to ensure business growth.

See how to package and sell Managed Services as a solution, and how to bolt Managed Services onto other solutions or core competencies. See how to win new clients by selling core solutions, then going deeper and wider with them as clients. See how the services continuum can be applied to make it easy to deliver consistent, repeatable solution sets and get better each time. Learn how consulting adds value to offerings and can lead to the coveted trusted advisor role.

TOOLS

You will take away customizable tools and templates, including:

1. A worksheet you can use to forecast revenue streams from marketing and selling managed services prospects.
2. A downtime cost calculator you can use to show prospects the true costs when their systems go down.
3. An ROI calculator you can use to reveal savings your prospects can achieve from investing in your Managed Services.

LEARNING OBJECTIVES – The attendee will be able to:

1. Confirm the benefits of selling Managed Services to prospects.
2. Understand reasons prospects buy Managed Services.
3. Develop the consulting component of selling Managed Services to prospects.
4. Sell Managed Services as a solution.
5. Bolt Managed Services onto each solution that is sold.
6. Execute marketing initiatives to build the sales pipeline.
7. Prepare your sales strategy to sell to prospects.
8. Recap a Year in the Life of a successful MSP.
9. Next step options for your consideration.

"Fantastic series that will provide a blueprint for the transitions & growth for my business. Thanks to Len for a fabulous job!"

- Glen, CA

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