MSP MASTERED® CERTIFICATION

LEVEL 1 — Operational Fundamentals

Optimizing and Integrating Your Business Platforms

Presented by :

ITGlue Kaseya GRAPHUS ID AGENT UNITRENDS MSP RapidFireTools® ERICKSIMPSON.COM
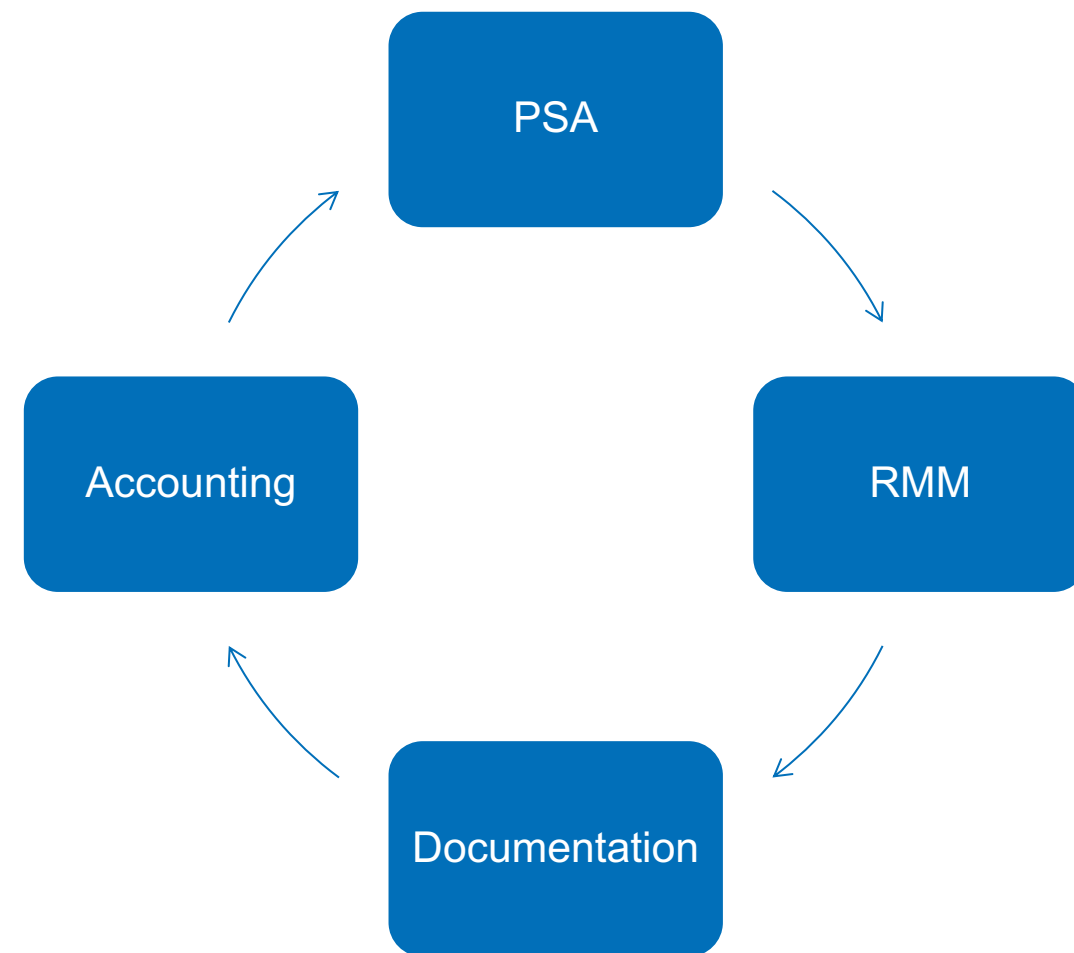
There's Only 2 Ways to Increase Net Profit

Increase Gross Profit

Reduce Expenses

Impact On 5 Critical Areas

Service Desk
PSA
RMM
Documentation

Projects
PSA
RMM
Documentation

Marketing
PSA

Sales
PSA
RMM
Documentation

Financials
Accounting
PSA
RMM
Documentation

Optimization & Integration Improves Efficiency

Productivity	100%	75%	50%
True Cost Per Hour	$100	$150	$200

Higher Efficiencies and Automation Result In Competitive Advantage

- Lower Costs
- Pricing Flexibility
- Increased Margins
- Greater Scalability

Optimizing Your PSA for Service Desk

- Your Company Information
- Your Staff
- Your Clients' Information*
- Your Service Types
- Your Labor Costs
- Your Labor Rates
- Your Service Boards
- Your Email Connector(s)
- Your Dispatch Board
- Your Surveys

- Your Client Portal
- Your Agreements
- Your Agreement Templates
- Your SLAs
- Your Issue Types & Sub Issue Types
- Your Automations – Tickets, Tasks, Alerts & Escalations
- Your Reports & Branding
- Your Invoices*
- Your Integrations
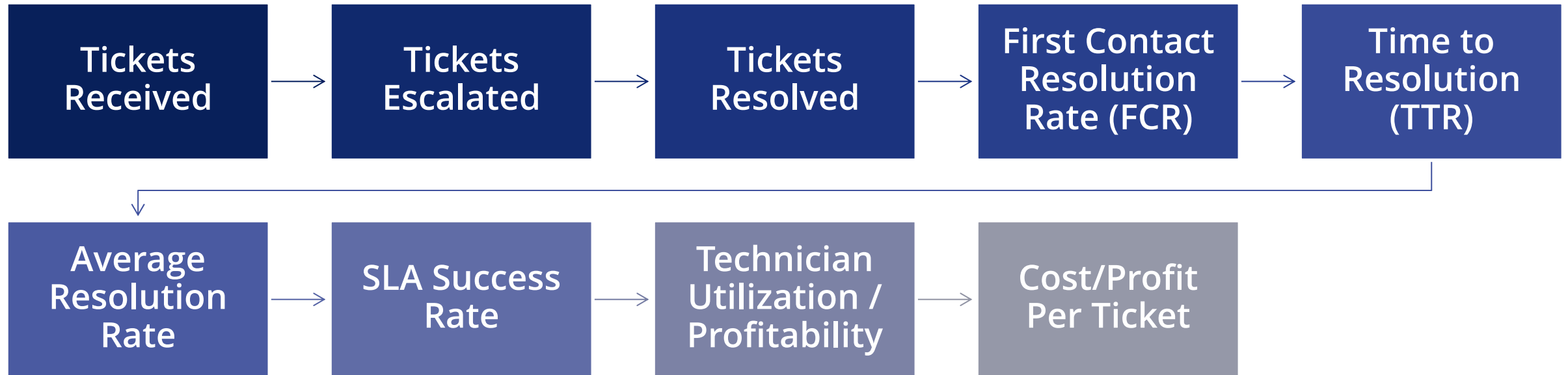
Optimize Your Issue Types/Sub-Issue Types

Admin	Hardware - Remote	Network - Onsite	OS - Onsite	Software/SaaS - Onsite
	Hardware - Onsite	Network - Remote	OS - Remote	Software/SaaS - Remote
User Rights - Profile Troubleshooting	Printer - Troubleshooting	Internet - Troubleshooting	Windows OS - Troubleshooting	Driver - Troubleshooting
User Rights - Password Reset	Printer - Add/Remote/Change	Internet - Add/Remove/Change	Windows OS - Install/Reinstall/Update	Driver - Install/Reinstall/Update
User Rights - Add/Remove/Change	Printer - Configuration	Internet - Configuration	Windows OS - Configuration	Driver - Configuration
User - Onboard	Workstation - Troubleshooting	Intranet - Troubleshooting	Mac OS - Troubleshooting	Print Driver - Troubleshooting
User - Offboard	Workstation - Add/Remove/Change	Intranet - Add/Remove/Change	Mac OS - Install/Reinstall/Update	Print Driver - Install/Reinstall/Update
User - Contact Update	Workstation - Configuration	Intranet - Configuration	Mac OS - Configuration	Print Driver - Configuration
	Scanner - Troubleshooting	VPN - Troubleshooting	Server OS - Troubleshooting	Chrome - Troubleshooting
	Scanner - Add/Remove/Change	VPN - Add/Remove/Change	Server OS - Install/Reinstall/Update	Chrome - Install/Reinstall/Update
	Scanner - Configuration	VPN - Configuration	Server OS - Configuration	Chrome - Configuration
	Router - Troubleshooting	LAN - Troubleshooting	Linux - Troubleshooting	PDF - Troubleshooting
	Router - Add/Remove/Change	LAN - Add/Remove/Change	Linux - Install/Reinstall/Update	PDF - Install/Reinstall/Update
	Router - Configuration	LAN - Configuration	Linux - Configuration	PDF - Configuration
	Switch - Troubleshooting	WAN - Troubleshooting	Android - Troubleshooting	Edge - Troubleshooting
	Switch - Add/Remove/Change	WAN - Add/Remove/Change	Android - Install/Reinstall/Update	Edge - Install/Reinstall/Update
	Switch - Configuration	WAN - Configuration	Android - Configuration	Edge - Configuration
	Mobile Device - Troubleshooting	BDR - Configuration	iOS - Troubleshooting	Internet Explorer - Troubleshooting
	Mobile Device - Add/Remove/Change	BDR - File Restore	iOS - Install/Reinstall/Update	Internet Explorer - Install/Reinstall/Update
	Mobile Device - Configuration	BDR - Server Restore	iOS - Configuration	Internet Explorer - Configuration
	Firewall - Troubleshooting	BDR - Troubleshooting	DNS - Troubleshooting	KnowBe4 - Troubleshooting
	Firewall - Add/Remove/Change	BDR - Share Restore	DNS - Add/Remove/Change	KnowBe4 - Install/Reinstall/Update
	Firewall - Configuration	BDR - Test Restore	DNS - Configuration	KnowBe4 - Configuration
	Monitor(s) - Troubleshooting		Mapped Drive - Troubleshooting	One Drive - Troubleshooting
	Monitor(s) - Add/Remove/Change		Mapped Drive - Add/Remove/Change	One Drive - Install/Reinstall/Update
	Monitor(s) - Configuration		Mapped Drive - Configuration	One Drive - Configuration
	Peripheral - Troubleshooting		Print Management - Troubleshooting	Teams - Troubleshooting
	Peripheral - Add/Remove/Change		Print Management - Add/Remove/Change	Teams - Install/Reinstall/Update
	Peripheral - Configuration		Print Management - Configuration	Teams - Configuration
			DHCP - Troubleshooting	Outlook - Troubleshooting
			DHCP - Add/Remove/Change	Outlook - Install/Reinstall/Update
			DHCP - Configuration	Outlook - Configuration
			Certificate - Troubleshooting	QuickBooks - Troubleshooting
			Certificate - Add/Remove/Change	QuickBooks - Install/Reinstall/Update
			Certificate - Configuration	QuickBooks - Configuration
				Sharepoint - Troubleshooting
				Sharepoint - Install/Reinstall/Update
				Sharepoint - Configuration

Optimize Your Alerting & Escalation Automation

Priority	Internal Response Time	Client Response Time	Resolution Time	Escalation threshold
1	Within 30 Minutes	Within 1 hours between 8am-5pm M-F	ASAP - Best Effort	2 hours
2	Within 2 Hours	Within 4 hours between 8am and 5pm M-F	ASAP - Best Effort	8 hours
3	Within 12 Hours	Within 24 hours between 8am and 5pm M-F	ASAP - Best Effort	48 hours
4	Within 24 Hours	Within 48 hours between 8am and 5pm M-F	ASAP - Best Effort	96 hours

Alerts - Priority 1

New Ticket	1. Email client that we received ticket, we will assign it to the appropriate technician to begin work	
	2. Alert Dispatcher if not assigned in 15 minutes	
	3. Alert Dispatcher and Service Manager if not assigned in 20 minutes	
	4. Alert Dispatcher, Service Manager and Service Director if not assigned in 30 minutes	
Assigned	1. Email Alert to client that a technician has been assigned and is reviewing the incident. Engineer will be contacting you shortly.	
	2. Email Engineer they have been assigned a ticket(already done currently)	
	3. Alert Engineer if not acknowledged in .25 hour	
	4. Alert Engineer and Dispatcher if not acknowledged in .50 hours	
	5. Alert Engineer, Dispatcher and Service Manager if not acknowledged in .75 hours	
	6. Alert Engineer, Dispatcher, Service Manager and Service Director if not acknowledged in 1 hour	
Escalate in 2 hours	1. Email Alert to customer that the incident has been escalated to Tier 3 support technician	
	2. Email Alert to Dispatcher - Ticket needs to be escalated	
	3. Email Alert to Engineer this has been escalated to them	
	4. Alert Engineer and Dispatcher if new engineer hasn't acknowledged in .25 hour	
	5. Alert Engineer, Dispatcher and Service Manager if not acknowledged in .50 hours	
	6. Alert Engineer, Dispatcher, Service Manager and Service Director if not acknowledged in .75 hours	

Alerts - Priority 2

New Ticket	1. Email client that we received ticket, we will assign it to the appropriate technician to begin work	
	2. Alert Dispatcher if not assigned in 15 minutes	
	3. Alert Dispatcher and Service Manager if not assigned in 30 minutes	
	4. Alert Dispatcher, Service Manager and Service Director if not assigned in 45 minutes	
Assigned	1. Email Alert to client that a technician has been assigned and is reviewing the incident. Engineer will be contacting you shortly.	
	2. Email to Engineer they have been assigned a ticket	
	3. Alert Engineer if not acknowledged in 2 hours	
	4. Alert Engineer and Dispatcher if not acknowledged in 2.5 hours	

Status	Event	Action	To	Details
New	Alert	Send Email	Contact for this item	Hi , I have received Ticket# / Ticket Description. A support technician will be contacting you shortly to assist. Thank you for your patience and we apologize for any inconvenience this has caused you. Thank You, Your Name Your Company Name
	Resource has been assigned	Change Status	Assigned	
Assigned	Alert	Send Email	Contact for this item	Hello <contact>, A team member has been assigned to Ticket# / Ticket Description, and will be reviewing the details of your service request. If there is any additional information you would like to provide regarding the issue please email - support@yourcompanyurl.com Thanks for your patience. Your Name Your Company Name
	Resource Acknowledgment	Change Status	In Progress	
In Progress	Alert	Send Email	Contact for this item	Hello <contact>, A team member is currently working on your Ticket# / Ticket Description. You will be updated as to our progress on this issue as the status changes.

Analyze Your Service Desk Performance

| Tickets Received | → | Tickets Escalated | → | Tickets Resolved | → | First Contact Resolution Rate (FCR) | → | Time to Resolution (TTR) |

| Average Resolution Rate | → | SLA Success Rate | → | Technician Utilization / Profitability | → | Cost/Profit Per Ticket |

Optimizing Your PSA for Projects

- Your Company Information
- Your Staff
- Your Clients' Information*
- Your Service Types
- Your Labor Costs
- Your Labor Rates
- Your Project Board(s)

- Your Email Connector(s)
- Your Project Board
- Your Project Templates
- Your Automations – Tickets, Tasks, Alerts & Escalations
- Your Reports & Branding
- Your Invoices*
- Your Integrations

Analyze Project Performance

- **Active & Scheduled Projects**
- **Projects/Phases Under / Over Budget**
- **Task/Phases Overdue / Completed**
- **Changes Pending / Approved**
- **Technician Utilization / Profit**
- **Actual Project Cost / Profitability**
- **Customer Satisfaction**

Optimizing Your PSA for Marketing & Sales

- Your Company Information
- Your Staff
- Your Clients' and Prospects' Information
- Your Email Messages & Campaigns
- Your Surveys
- Your Email Connector(s)
- Your Sales Board(s)
- Your Service Types

- Your Labor Costs
- Your Labor Rates
- Your Proposal Templates
- Your Agreement Templates
- Your Sales Funnel
- Your Automations – Opportunities, Tasks, Alerts & Escalations
- Your Sales Reports & Branding
- Your Invoices*
- Your Integrations

Analyze Your Marketing Performance

Marketing Activities

Marketing Qualified Leads (MQLs) Generated

Sales Qualified Leads (SQLs) Generated

Cost Per Lead (CPL)

Customer Acquisition Costs (CAC)

Customer Lifetime Value (CLV)

Marketing Return on Investment (ROI)

Analyze Your Sales Pipeline

- What is the value of your pipeline?

- Where are all of your sales opportunities?

- What phase of the sales process/funnel are they in?

- Which ones are stuck in a phase longer than expected and why?

- What needs to be done to keep the pipeline healthy?

- Review Weekly

AWARENESS

INTEREST

DECISION

ACTION

Analyze Your Sales Performance

- Activity vs. Productivity
- Sales Goal
- >4.5 X W2 in Gross Profit
- >12 X W2 in Gross Sales
- Are you consistently conducting the activities that lead to sales?
- Review Weekly

Incent through bonuses and commissions to achieve/exceed

Optimizing Your PSA for Accounting

- Your Company Information
- Your Staff
- Your Clients' Information
- Your Service Types
- Your Labor Costs
- Your Labor Rates

- Your Inventory/Procurement
- Your Accounting Codes
- Your Agreements
- Your Reports & Branding
- Your Automated Invoices*
- Your Integrations

Optimizing Your RMM

- Your Company Information
- Your Staff
- Your Clients' Information
- Your Agent Templates

- Your Automations – Device Scans, Tickets, Tasks, Alerts & Escalations
- Patching & Updating
- Your Integrations
- Your Reports & Branding

Optimizing Your Documentation Platform

- Your Company Information
- Your Staff
- Your Clients' Information
- Your Documentation Templates

- Your Integrations
- Your Reports & Branding

Optimizing Your Accounting Platform

- Your Company Information
- Your Banking & Financial Information
- Your Clients' Information
- Your Labor Costs
- Your Overhead Costs
- Your A/R & A/P Function
- Your Payroll Function*

- Your Chart of Accounts
- Your P&L Statement
- Your Tax Information
- Your Financial Reports
- Your Inventory/Procurement Process*
- Your Invoices*
- Your Integrations*

Normalize Your Chart of Accounts/P&L

BALANCE SHEET ACCOUNTS

Asset Accounts

Account Number	Account	Type	Description/Explanation of Account
10200	Petty Cash	Bank	This account is used to make miscellaneous small payments such as C.O.D. deliveries, postage, etc.
10300	<Bank> Savings - <Account#>	Bank	Funds deposited in regular interest-bearing accounts for current operating purposes.
10400	<Bank> Checking - <Account#>	Bank	All funds for general operating transactions should be recorded in these accounts
11000	Accounts Receivable	Accounts Receivable	Amounts owed to the company for services performed or products sold but not yet paid for.
12000	Inventory Asset	Other Current Asset	Inventory valuation
12100	Loans Receivable	Other Current Asset	Header Account
12110	Loans Receivable:L/R - <Name>	Other Current Asset	Loan #1
12200	Prepaid Expense	Other Current Asset	Paid expenses that have not been allocated yet
14990	Undeposited Funds	Other Current Asset	This account is used by the QB system to record all receipts. When deposits are made this account is credited and the appropriate bank account debited.
15000	Computer Hardware	Fixed Asset	Computer Hardware valued in excess of a value your CPA determines is considered a fixed asset and is recorded in this account.
15100	Computer Software	Fixed Asset	Computer Software valued in excess of a value your CPA determines is considered a fixed asset and is recorded in this account.
15200	Furniture and Fixtures	Fixed Asset	Furniture & Equipment valued in excess of a value your CPA determines is considered a fixed asset and is recorded in this account.
15900	Accumulated Depreciation	Fixed Asset	The total depreciation of fixed assets that have been charged to an expense since those assets were acquired and made available for use
19500	Suspense	Other Asset	For transactions that you need to review with your CPA or to use temporarily while moving funds from accounts that cannot be on the same Journal Entry (such as A/R to A/P)

Liability Accounts

Account Number	Account	Type	Description/Explanation of Account
20000	Accounts Payable	Accounts Payable	Amount owed to suppliers who provided goods and services to the company but did not require immediate payment in cash.
21000	Credit Cards	Credit Card	Header Account
21010	Credit Cards:Credit Card 1 <Account#>	Credit Card	Credit Card #1
22000	Unearned Income	Other Current Liability	Amounts received in advance of delivering goods or providing services. When the goods are delivered or services are provided, this liability amount decreases. (customer deposits, pre-payments, etc.)
23000	Payroll Liabilities	Other Current Liability	Gross salaries and wages earned which have not been paid at the end of an accounting period (accrual basis) and unpaid payroll taxes (cash or accrual basis)
23500	Employee Expense Reimbursement	Other Current Liability	Reimbursement of employee expenses if processed as part of payroll.
25000	Sales Tax Payable	Other Current Liability	Sales Tax Owed
25100	Sales Tax Payable-Prepaid	Other Current Liability	To track sales tax paid at time of purchase of COGS
25200	Electronic Recycling	Other Current Liability	To track state electronic waste recycling fee collected from MSP client new electronic purchases - State Owed
25300	Electronic Recycling - Prepaid	Other Current Liability	To track electronic waste recycling fee paid at time of purchase of COGS
28000	Loans Payable	Other Current Liability	Header Account
28010	Loans Payable:L/P - <Name>	Other Current Liability	Loan #1
29000	Notes Payable	Long Term Liability	Header Account
29010	Notes Payable:N/P - <Name>	Long Term Liability	Notes Payable #2

Equity Accounts

Account Number	Account	Type	Description/Explanation of Account
30000	Opening Balance Equity	Equity	Records the amount in the Opening Balance
31000	Capital Stock	Equity	The original capital paid into or invested in the business
32000	Dividends Paid	Equity	Payments made by a corporation to its shareholder members.
33000	Retained Earnings	Equity	The portion of net income which is retained by the corporation

Courtesy of Visionary360