



CERTIFICATION



LEVEL 2

Service Essentials

Service Desk Incident Escalation & Lifecycle Management for Resolution

Presented by :

 ITGlue

 Kaseya

GRAPHUS

 AGENT

UNITRENDS 

RapidFireTools®

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.COM

NOC vs. Service Desk

- NOC focuses on proactive and reactive equipment, operating system, application software and service support and maintenance
- Service Desk focuses on proactive and reactive end-user support



NOC and Service Desk Responsibilities



Receives all incident notifications



Records all incidents in PSA solution



Classifies all incidents and correctly documents nature, affected users, systems, hardware and services



Prioritizes all incidents for effective escalation



Troubleshoots according to Best Practices



Escalates incidents to maintain SLA's

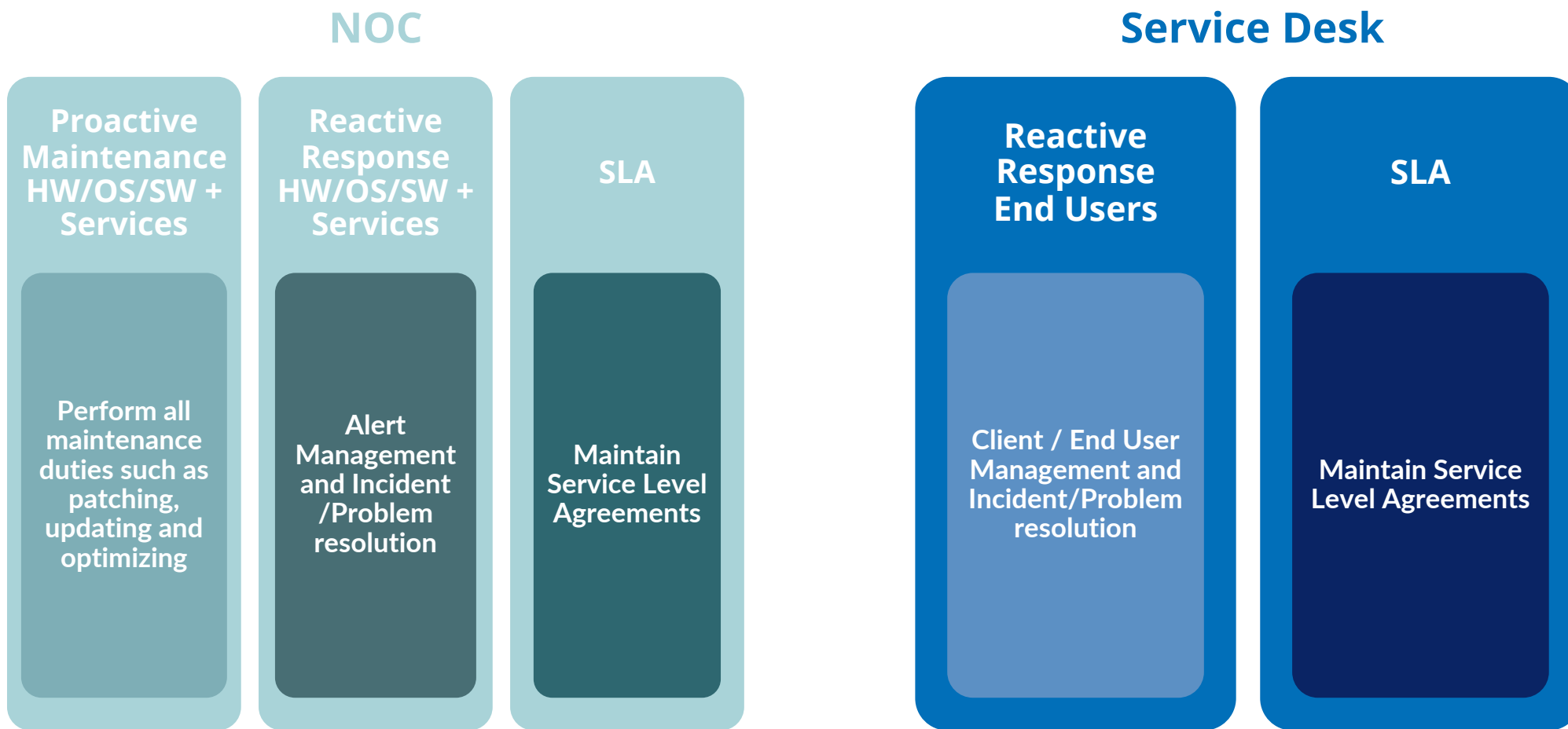


Maintains consistent communication with all affected parties



Performs all scheduled maintenance activities

NOC and Service Desk Duties



NOC and Service Desk Processes

- Incident Management
- Problem Management
- Configuration Management
- Change Management
- Release Management
- Risk Management
- Communication Management
- Service Level Management
- Service Financial Management
- Capacity Management
- Service Continuity Management
- Availability Management
- Security Management



**NOC
and
Service
Desk**

When Tiered, Staffed and Trained Properly a Best-In-Class Service Desk



Has a dedicated Service Dispatcher(s) Closes Level 1 incidents within 30-45 minutes

97%

Closes up to 97% of all requests with Level 1 resolution

2%

Escalates up to 2% of all request to Level 2

1%

Escalates up to 1% of all requests to Level 3



Schedules onsite service only when incidents cannot be resolved remotely (*with a few exceptions)



Adheres to strict, established SLAs



Increases client satisfaction through standardized processes and reporting

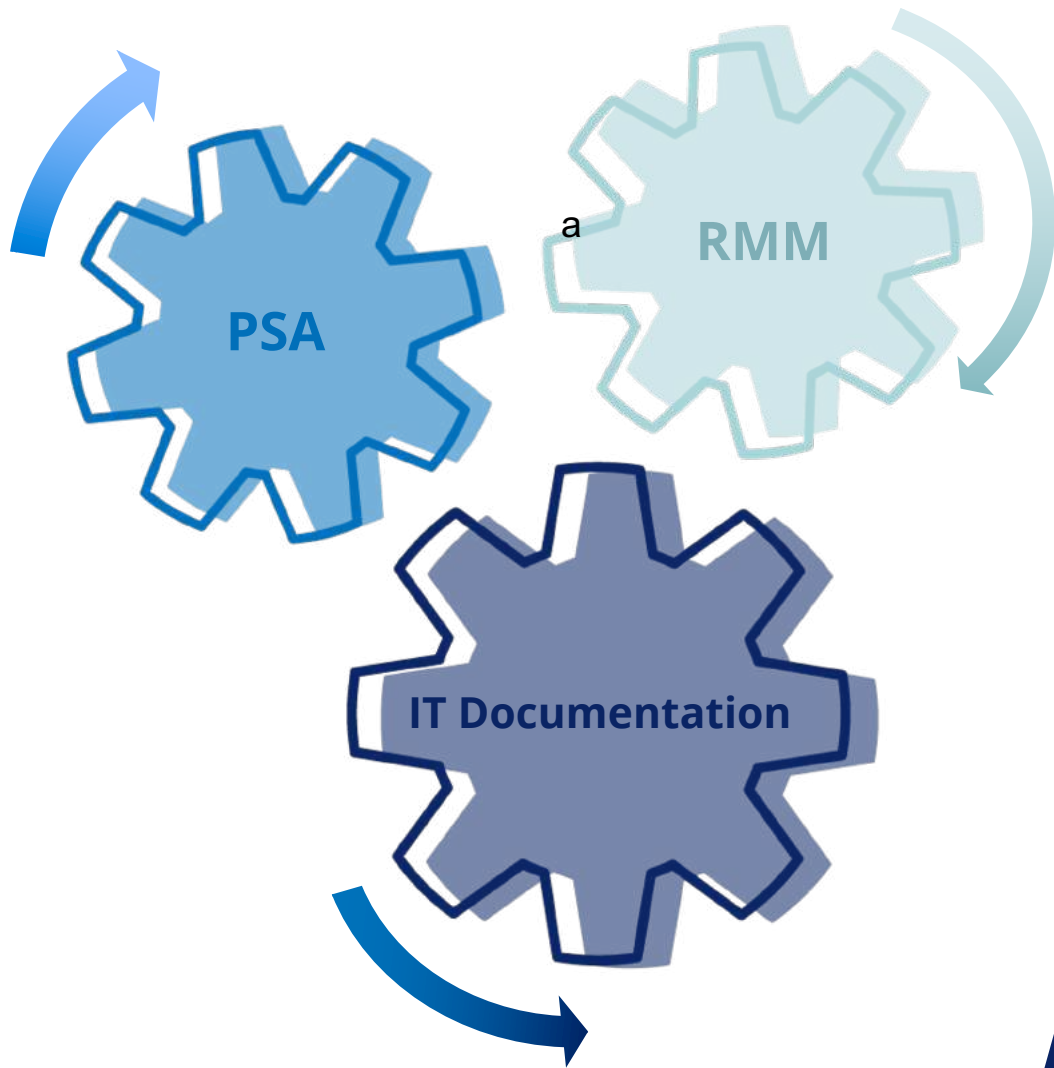


Improves net profits through efficient, remote operations (reduced truck rolls)



Incident Management vs. Problem Management

- Incident Management's purpose is to restore business continuity as quickly as possible
- Problem Management seeks to determine the root cause of recurring incidents



Top 3 NOC and Service Desk Tools

****Priceless****

MSP Mastered®

Service Desk

Performance

Optimization Tips



Optimize Platforms

- PSA Issue Types and Subtypes
- PSA Automated Communication, Alerting and Escalation
- RMM Noise
- Reporting



Document Processes

- SLA Management
- L1, L2, L3 & Onsite Ticket Types and Time to Resolution (TTR)
- Incident Identification, Prioritization, Assignment
- Incident Management and Resolution
- Incident Escalation



Capacity Plan Properly

- Level 1, 2, 3, Onsite Support for Maximum Utilization (N+1)
- Dispatchers

Leverage PSA to Increase Ticket Categorization Accuracy and Reporting – Issue Types and Subtypes

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

Leverage PSA Automation to Maintain SLAs - Alerting and Escalation

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	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 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

Leverage PSA Automation to Reduce Costly Labor – Client Communication and Ticket Closure

Status	Event	Action	To	Details																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																									
New	Alert	Send Email	Assigned	Alert	Send Email	Contact for this item	<p>Hello <contact></p> <p>A team member has been assigned to Ticket# / Ticket description. This will be reviewed and service request will be reviewed for additional information. Please email support@yourcompanyurl.com if you need additional information.</p> <p>Thanks for your patience.</p> <p>Your Name Your Company Name</p>	Waiting on Client	Alert after 24 hours since last update	Send Email	Assigned Resource	<p>Please make sure to keep this ticket up to date and note any and all customer contact attempts that have been made. There should be 3 attempts to contact the customer before the ticket is moved to completed status.</p> <p>Dear <contact>,</p> <p>We have made several attempts to reach you regarding Ticket #/Ticket description. If we do not hear back from you within 24 hours, we will assume the issue to be unimportant at this time and close this ticket. If you still need assistance at a later time, please submit another service request ticket when you are available to assist us in troubleshooting the issue.</p> <p>If this is sent in error, please reply to support@yourcompanyurl.com and we will make the appropriate changes.</p> <p>Thank You, Your Name Your Company Name</p>																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																	
	Resource has been assigned	Change Status		Resource Acknowledgment	Change Status	In Progress			Alert after 72 hours in status	Send Email	Contact for this item	Alert after 96 hours in status	Send Email	Service Dispatcher	<p>The customer has not responded after 3 attempts. Please verify the assigned resource has made the appropriate number of attempts to contact ** including at least 1 phone call**. If conditions have been met, please change the status to closed.</p>																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																														
Assigned	Alert	Send Email	In Progress	Alert	Send Email	Contact for this item	<p>Hello <contact></p> <p>A team member has been assigned on your Ticket. You will be updated on progress on ticket changes.</p> <p>Thanks for your patience.</p> <p>Your Name Your Company Name HI <assigned></p>	Waiting on Client																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																					
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Leverage Documentation Platform to Improve Efficiencies and CX – Incident Management Processes

- Application Wont Start Troubleshooting Process.docx
- Data Backup Troubleshooting Process.docx
- Disable System Sleep or Hibernate from the Command Line.docx
- Email - Locating Domain Spam System and MX Records (MXtoolbox).docx
- Internet Problems Troubleshooting Process.docx
- Local or Hosted Email Not Working Troubleshooting Process.docx
- Monitor - Display Troubleshooting.docx
- Office 365 - Add a User or Contact to a Distribution Group.docx
- Office 365 - Enable Unlimited Archiving.docx
- Office 365 - Licensing Issues.docx
- Office 365 - Outlook Continually Asking for Password.docx
- Office 365 - Shared Mailbox - Configure Permissions.docx
- Office 365 - Updating AD Synced User information.docx
- PC Will Not Boot Troubleshooting Process.docx
- Printing - Add New Printer.docx
- Printing - Not in Color.docx
- Printing - Printer Missing.docx
- Printing - Printer Offline.docx
- Printing - Wrong Size Paper.docx
- QuickBooks - H202 Error Stuck in single user mode.docx
- Remote Access Not Working Troubleshooting Process.docx

- Sage - Display Issues.docx
- Sage - Password Reset.docx
- Setup User in Active Directory Process.docx
- SharePoint - Add Remove User Permissions.docx
- Spam - Email Verification.docx
- Spam - Office 365 - Blacklist - Whitelist.docx
- Unitrends Backup - Restore files and folders.docx
- User Admin - New User Creation - Onboard SOP.docx
- User Admin - Password Reset.docx
- User Admin - User Termination - Offboard SOP.docx
- User Cant Print Troubleshooting Process.docx
- User Has No Access to Network Files Troubleshooting Process.docx
- User Unable to Log In Troubleshooting Process.docx
- VPN - First Time Setup - Installation.docx
- VPN - Unable to Login.docx
- Windows - Change Password from CMD Line.docx
- Windows - no logon servers available to service the logon request.docx
- Windows - Remote Access Slow.docx
- Windows - Shared Drive - Troubleshooting.docx
- Windows Server - File Folder Permissions.docx

Resource Capacity Planning for Service Desk Techs and Dispatchers

• Based On

- Total Ticket Count Per Year
- % of Tier 1, 2, 3 and Onsite Tickets
- SLA

• Required Data

- Total Tickets
- Tiering and Onsite Ticket Segmentation %
- Time Allotted Per Ticket Type Before Escalation
- Number of Hours Available by Tech per Month
- Number of Available Techs Per Tier
- Number of Available Dispatchers

Expected % of Tier 1 Tickets out of 100%	90%			
Expected % of Tier 2 Tickets out of 100%	7%			
Expected % of Tier 3 Tickets out of 100%	3%			
Expected % of Overall Tickets Escalated to Onsite Support	10%			
Trouble Ticket Calculation	Tier 1	Tier 2	Tier 3	Onsite
Number of tickets per year (calls, email and/or Web requests)	30000	2100	900	3000
Targeted work time per ticket (in minutes)	45	90	180	180
Total required work hours per help desk tier	22500	3150	2700	9000
Help Desk Staffing	Tier 1	Tier 2	Tier 3	Onsite
Current existing number of technicians per tier	20.00	3.00	1.00	5.00
Forecasted number of FTE technicians needed per tier	20.59	2.88	2.47	8.24
Over/Under Capacity	-0.59	0.12	-1.47	-3.24
Dispatch Staffing				
Current existing number of Dispatchers	1.00			
Forecasted number of Dispatchers needed	1.25			
Over/Under Capacity	-0.25			

The Service Dispatch Process

- Participates in the provider's problem management and resolution process
- Assigns and manages resources and parts/availability
- Schedules remote, onsite and in-house services
- Interacts with the client to maintain and improve satisfaction
- Ensures service adherence to established SLAs
- Is responsible for the status and resolution of each and every service request
- Provides reporting



Dispatch Incident Assignment and Escalation

Dispatch Calendar

Resource:

Queue:

Event Type:

Appointments, To Dos, Activ

Q

Search (5)

Dispatch Actions

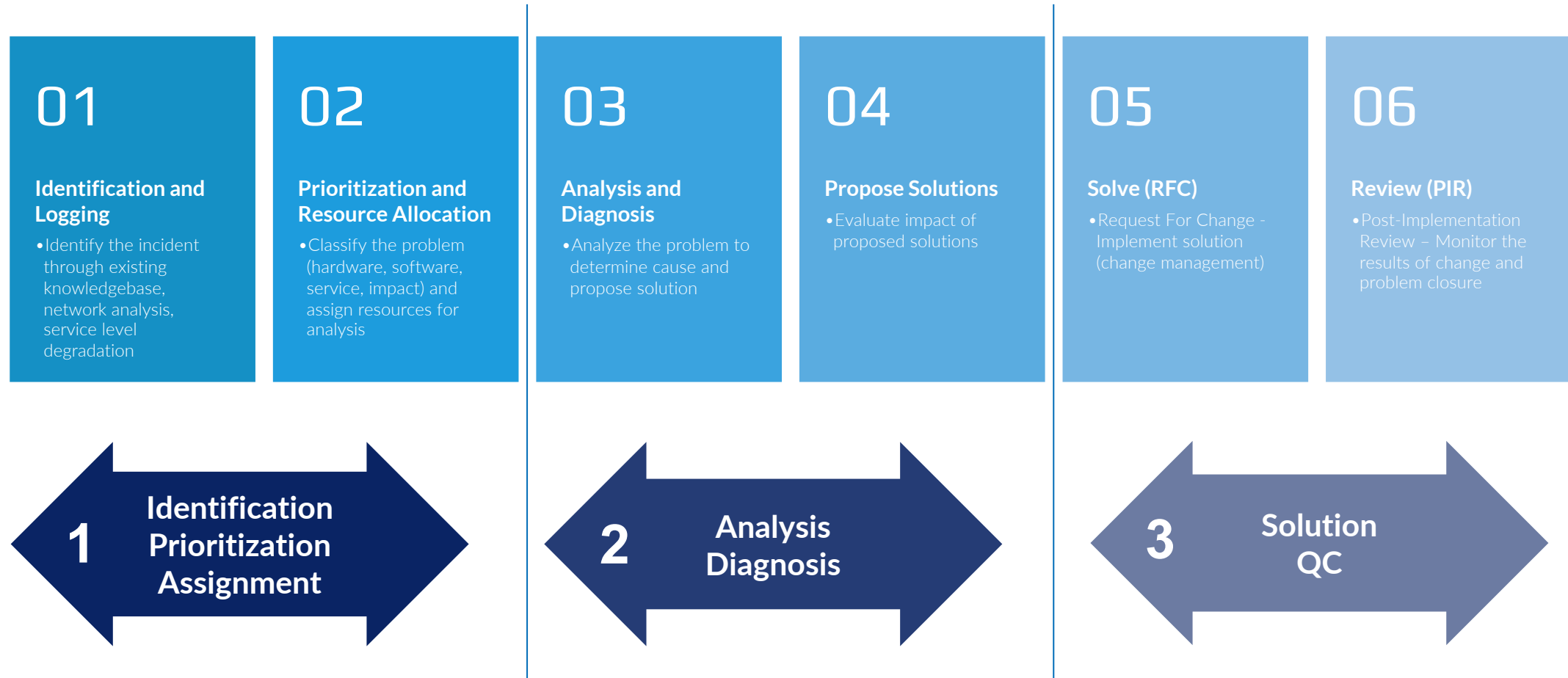
today

11/30/2020 - 12/06/2020

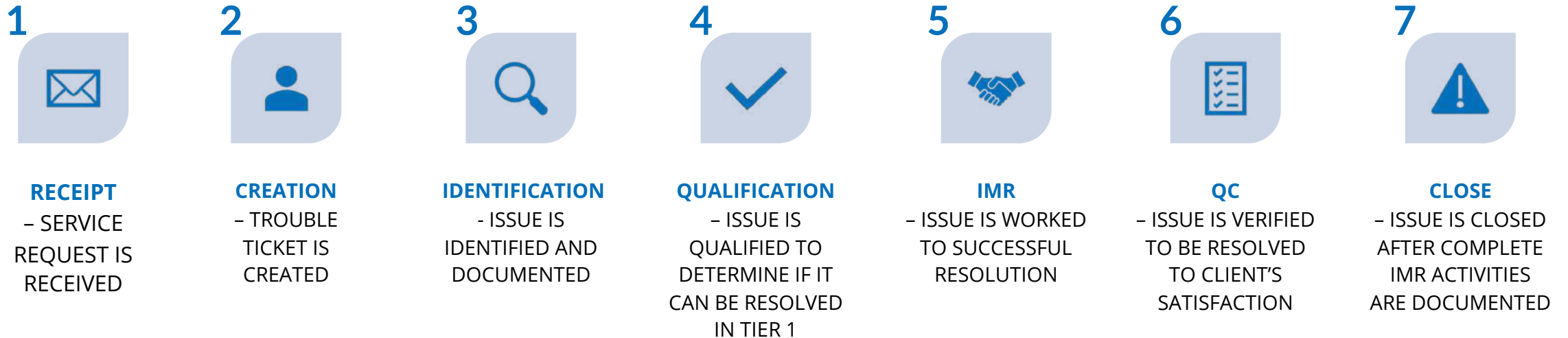
Day

	11/30/2020	12/01/2020	12/02/2020	12/03/2020	12/04/2020	12/05/2020
<div><div></div><div>Aaron Sauma Chief Sales Officer</div></div>	<div><div></div><div>01:00 AM</div><div>Test Color</div></div>	<div><div></div><div>12:10 AM</div><div>Call Jim</div></div>	<div><div></div><div>01:00 AM</div><div>Marvel Cloud : Forgot Computer Login Password</div></div>	<div><div></div><div>08:00 AM</div><div>Send Proposal</div></div>		
		<div><div></div><div>10:48 PM</div><div>A- Data Systems Plus : test for services</div></div>				
<div><div></div><div>Afrin Shoukath Administrator</div></div>	<div><div></div><div>12:00 AM</div><div>Set up new workspace</div></div>	<div><div></div><div>12:00 AM</div><div>Marvel Cloud : Forgot Computer Login Password</div></div>	<div><div></div><div>12:00 AM</div><div>Marvel Cloud : Forgot Computer Login Password</div></div>	<div><div></div><div>12:00 AM</div><div>Update MS on laptops Marvel Cloud</div></div>	<div><div></div><div>12:00 AM</div><div>Marvel Cloud : Forgot Computer Login Password</div></div>	
		<div><div></div><div>10:48 PM</div><div>A- Data Systems Plus : test for services</div></div>	<div><div></div><div>09:30 AM</div><div>AAA : TEST for workflow2</div></div>			
<div><div></div><div>Alanna Mcleod Administrator</div></div>	<div><div></div><div>12:00 AM</div><div>Marvel Cloud : Forgot Computer Login Password</div></div>	<div><div></div><div>12:00 AM</div><div>Marvel Cloud : Forgot Computer Login Password</div></div>	<div><div></div><div>03:00 AM</div><div>Call Stacey from 5 Guys Burgers</div></div>	<div><div></div><div>01:00 AM</div><div>Marvel Cloud : Forgot Computer Login Password</div></div>	<div><div></div><div>05:40 PM</div><div>Call Ant Man</div></div>	
	<div><div></div><div>03:00 AM</div><div>Update Windows</div></div>					

The 3 Phases of Incident Management



The 7 Step Incident Management Process



If Issue Cannot Be Resolved in Tier 1...

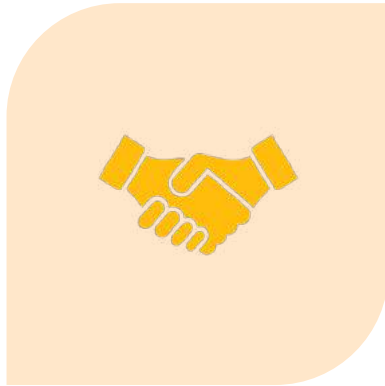


4.1 ESCALATION – ISSUE IS
ESCALATED TO TIER 2



4.2. QUALIFICATION – ISSUE IS
QUALIFIED TO DETERMINE IF IT
CAN BE RESOLVED IN TIER 2

If Issue Can Be Resolved in Tier 2...



5. IMR – ISSUE IS WORKED TO SUCCESSFUL RESOLUTION



6. QC – ISSUE IS VERIFIED TO BE RESOLVED TO CLIENT'S SATISFACTION



7. CLOSE – ISSUE IS CLOSED AFTER COMPLETE IMR ACTIVITIES ARE DOCUMENTED

If Issue Cannot Be Resolved in Tier 2...

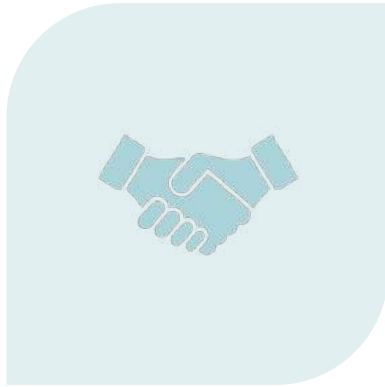


4.3 ESCALATION – ISSUE IS
ESCALATED TO TIER 3



4.4 QUALIFICATION – ISSUE IS
QUALIFIED TO DETERMINE IF IT
CAN BE RESOLVED IN TIER 3

If Issue Can Be Resolved in Tier 3...



5. IMR – ISSUE IS WORKED TO SUCCESSFUL RESOLUTION



6. QC – ISSUE IS VERIFIED TO BE RESOLVED TO CLIENT'S SATISFACTION



7. CLOSE – ISSUE IS CLOSED AFTER COMPLETE IMR ACTIVITIES ARE DOCUMENTED

If Issue Cannot Be Resolved in Tier 3...



4.4 ESCALATION – ISSUE IS
ESCALATED TO ONSITE
SUPPORT



4.5 QUALIFICATION – ISSUE IS
QUALIFIED TO DETERMINE IF IT
CAN BE RESOLVED ONSITE

If Issue Can Be Resolved Onsite...



5. IMR – ISSUE IS WORKED TO
SUCCESSFUL RESOLUTION



6. QC – ISSUE IS VERIFIED TO BE
RESOLVED TO CLIENT'S
SATISFACTION



7. CLOSE – ISSUE IS CLOSED
AFTER COMPLETE IMR ACTIVITIES
ARE DOCUMENTED

If Issue Cannot Be Resolved Onsite...



IT/SERVICE MANAGER
DECISION POINT

NOC and Service Desk Key Performance Indicators



Trouble Tickets Closed Within SLA Yesterday



Trouble Tickets Carryover From Yesterday



Trouble Tickets Closed Last Week



Trouble Tickets Pending



Onsite Service Appointments Completed Yesterday



Onsite Service Appointments Rescheduled Yesterday



Managed Services Hours Logged/Billed Yesterday



Project Hours Logged/Billed Yesterday



Non-Billable Hours Logged Yesterday



Onsite Service Hours Logged/Billed Yesterday



Utilization/Realization by Technician



Profitability by Client, Agreement, Project, Technician

UPCOMING WEBINARS

The banner features a blue background with a hexagonal pattern. On the left, there are several white icons: a laptop with a shield, a gear, a hand holding a shield, a globe with a checkmark, and a person with a gear. In the top right corner is the 'ID AGENT' logo with 'A Kaseya COMPANY' underneath. The main text is 'MSP Cybersecurity Certification' in large white font. Below it, the date and time are listed: 'Monday, May 17, 2021' and '1pm ET / 10am PT'.The banner has a dark blue background with binary code. On the left is a portrait of Tony Sales. To his right, the text reads: 'TONY SALES', 'CYBERCRIME:', 'SALES NEVER FAILS', and '"BRITAIN'S GREATEST FRAUDSTER"'. Below this is the 'UNITRENDS MSP LIVE!' logo. On the right side, there is a stylized illustration of a person wearing a cowboy hat and holding a laptop. Below the illustration is a red button that says 'REGISTER NOW'. At the bottom right, the date and time are listed: 'MAY 25 @ 11AM EDT'.The banner has an orange background. The word 'Webinar' is in the top left. The main title is 'NIST Cybersecurity Framework -- The Swiss Army Knife of Cybersecurity' in large white font. Below the title, the date and time are listed: 'Wednesday, May 19th | 1 PM EST | 10 AMPST'. In the bottom right corner is the 'RapidFireTools' logo with 'A Kaseya COMPANY' underneath.The banner has a purple and blue background. On the left is a globe with a banner across it that says 'ITGlue 2021 GLOBAL BENCHMARK REPORT'. Below the globe is the title 'Benchmark Report Insights Panel' and the date and time 'WED, MAY 19TH | 8AM PT | 11AM ET'. On the right side, there are four portraits of speakers arranged in a 2x2 grid. Each portrait is accompanied by the speaker's name and title: Nadir Merchant (CTO & GM, IT Glue), Gary Pica (Owner & Founder, TruMethods), Richard Tubb (IT Business Growth Expert, Tubblog), and Andrew Moon (Master Technology & Business Strategist, Orange Nomad).