## LabTech Best Practices:
## 5 Tips to Get the Most Out of Your PSA and RMM Integration

*Mainstay Technologies started as a one-man shop seven years ago and has grown to a 31 employee operation managing 3,000 endpoints. Recognized by Inc. Magazine as one of the 5,000 fastest-growing private companies in America, Mainstay has achieved 40% growth each year for the last three years. They achieved this growth by delivering superior value to their clients and using best-in-class tools to increase operational efficiencies and drive revenue creation. Integrating their PSA and RMM solutions helped, too.*

## Why Integrate Your PSA and RMM Solutions?

A professional services automation (PSA) solution and remote monitoring and management (RMM) platform are essential tools for today's IT service provider. These critical tools enable complete management of your IT business and your clients' IT networks. Integrating your PSA solution with your RMM platform enables you to reduce operational costs and human error, boost productivity, improve billing accuracy, increase cross-selling and upselling opportunities, and meet service level agreements (SLAs).  The following five best practices will help you get the most out of your PSA and RMM integration.

### Increase Revenue

As a general rule, Mainstay Technologies puts an RMM agent on every machine they touch. Like other IT service providers who follow this practice, Mainstay uses the agents to provide basic monitoring for their non-contract clients, which enables them to identify issues and areas for growth and improvement. How does this work? First, the RMM agent discovers an issue using built-in monitors. The RMM agent then creates a ticket in the PSA solution. Using automated workflows, the ticket is routed to the appropriate team, who will communicate the issue to the

client and determine if they'd like the issue to be fixed for a fee. Repair time is added to the ticket and time is automatically added to the client's monthly invoice.

Clients are typically happy to pay for a fix, as they'd much rather have you repair antivirus software or update virus definitions than risk getting infected, or worse.

## Build Automation and Streamline IT Efficiencies

In addition to creating revenue, the other side of the equation is cost. You want to use these tools to streamline your processes and build efficiency, so fewer engineers, fewer NOC technicians and fewer employees within your company can deliver more services to more customers. You can add up to 20% to your bottom-line profits by maximizing IT efficiencies.

The beauty of having your RMM tickets flow into your PSA solution—whether a user calls in or the RMM platform pushes the ticket over—is that the data goes to the same place. You now have a history for your managed endpoints and can review and analyze captured data. If a user calls in because something broke, you can pull up the configuration, look at the history and see that Flash was updated overnight. Thus, rather than spend hours troubleshooting a system, you can quickly zero in on the issue because all the data you need is available at your fingertips within a single-pane-of-glass.

Automation can also save your technicians countless hours of maintenance time. If you come across a task that your technicians are doing over and over again using the same set of steps each time, automate it. Why pay your best technician to install third-party patches or restart services when he should be concentrating on proactive customer service and more complex tasks? Talk to your engineers and account managers and find out which tasks, if taken away, would most free them up to focus on providing more value to clients.

## Migrate Break-Fix Clients to a Managed Services Offering

Many IT service providers have been successful in using their RMM and PSA integration to convert their break-fix customers to a managed services contract. They do this by installing an agent on every PC they service and offering free basic alerting to break-fix clients to demonstrate exceptional customer service. Clients receive automatic notifications via the RMM tool and PSA workflow capabilities when issues are discovered and can opt to approve or forgo the suggested fix. Some RMM tools can actually create

timeline tickets and add time entries into their remediation scripts so time can be automatically billed through the PSA.

When you present your monthly or quarterly reports, you're able to show the value they would get if they were in a managed services contract. They start to see that they're getting these alerts and you're managing them. Then they transition to the thought of, "I don't have to sit here and approve the work on all these things if I just trust you to do it." As you mine a customer's system for more time material and more projects, their average monthly bill starts to increase and you can begin to slowly get them to see the benefits of making the transition to managed services.

There's always something that resonates with each client. Your managed services contracts are always going to be more expensive than a break-fix relationship, but there is so much more value that comes along with the cost. By presenting the data and explaining all the ways you can optimize and streamline their network, you help them see that value. And by getting your agents on their machines and collecting the right data, you can show them what they need to know so they can get the service they really need to make their business run better.

## Improve "Stickiness" and Demonstrate Value

Out of sight should not mean out of mind, but in some cases your managed services clients might begin to question whether they truly need your services. You're using your RMM tool to resolve service issues automatically, oftentimes before the client even knows a problem exists, so everything is running as it should, nothing ever breaks and they rarely see you. Your PSA tool is capturing proof of all the activities you are doing for your clients, whether manually or through automated scripts. It's important to share reports of the tasks completed—from virus definition updates and patches to restarting failed services—to demonstrate the value of your service and build credibility.

Let them see what's really going on in their systems and just how much work you are doing on their behalf. Why is their system running so smoothly? It's because you're taking care of all of these issues for them to achieve 99% uptime. As they see the amount of work you are doing and understand that the work is helping their operations run more efficiently, they're going to see the value you provide and will stick with you.

## A Holistic Approach for Overall Business Growth

You can't take poor business values, a poor quality staff and bottom of the barrel support and stick an RMM and PSA together and expect great results. If you take great technicians, who are still great even without those solutions, layer the RMM and PSA beneath them, and give them the support they need to focus on being excellent, then you'll see growth.

By integrating your RMM and PSA solutions, you're streamlining your service delivery to enable your staff to be more efficient so you can manage more endpoints with fewer engineers, expand your services and increase your client base without increasing headcount. At the same time, you're providing superior value to your clients, leading to long-term, strategic partnerships where your clients value the relationship as much as you do.

This article is based on the content outlined in Episode 21 of the MSP:360 Webinar Series. You can view Episode 21 in its entirety, as well as previous episodes of the MSP:360° Webinar Series at www.LabTechSoftware.com/MSP360.

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