



How to Master MSP Automation Projects

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It seems the entire channel agrees – automation is critical to increasing efficiency and improving outcomes for your MSP. But if you don't have a lot of background in implementing automation initiatives, where do you begin? IT Glue's documentation experts are well positioned to walk you through the basics of automation projects.

Step

1

Define your strategy

Clear Objectives

Why should you invest time in automation?

Make sure to identify clear objectives, and ensure that they are built into your workflow automation strategy from the beginning. Every process that you automate should contribute to at least one of the following:

- Reducing costs
- Increasing efficiency
- Enhancing profitability
- Facilitating growth

When you have defined a clear set of objectives that are specific to your business, these markers will ensure that you keep things on track and automate the right systems.

Ensure your focus is on the right areas

To determine which projects you should focus on first, take your list of potential projects and break them down by thinking about the upside and investment cost.

The highest priority projects are low investment and high upside. The lowest priority projects have a high investment cost and minimal upside.

To identify upside, think about the areas of your business that drain you the most. Conduct an in-house audit and focus your attention where it is most needed.

So many automation strategies fail not because the execution was bad, but because it solved a problem that wasn't that important to solve in the first place!



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Look for the areas where workflows are broken, and where workflows are frequently repeated. Identify these processes and define how automation can enhance them.

Create a wish list

Imagine your ideal world, where someone waved a magic wand and removed some of the cumbersome, laborious and error prone processes from your business, forever. That's a good thought, right?

Make that dream into a reality by writing it down. Then discuss it with your team and write it down some more.

Don't be afraid to record your desires and don't rule anything out. You'll likely be surprised at the rate technology is developing and chances are that there will be a solution for you.

"It's easy to feel overwhelmed at the beginning of an automation project. But as Vince Lombardi once said, "Inches make champions." Focusing on small changes will have a business-wide impact. We think of automation as a journey; we don't think it will ever be finished as such. But we have seen considerable benefits from the steps we've taken.

We are focused on making marginal gains and have witnessed first hand how these small gains have impacted our business, especially when you put several incremental gains together. Examples include reduced staff stress, improved mental health, enhanced profitability and a better ability to grow the business."

— James Ratcliff, MD, Ratcliff IT

Step

2

Do the groundwork

Research, research, research (& a Pugh matrix)

Once you know the areas of your business that need attention, and the ways you would like to (ideally) build in automation to your workflows, you can get started on your research.

Do not underestimate this step! It is critical to the success of your



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project and will ensure you make an informed decision when it comes to it.

Speak to your peers about their experiences, ask their advice and be sure to investigate plenty of vendors and options.

Once you have your options, create a Pugh Matrix to help you outline your findings and put them in the context of your business, this is a great tool to show other project stakeholders research findings.

Build an initial project plan and proposal

Next, you will build a project plan and proposal that will look at areas such as:

- Who will take care of the ins and outs of the project?
- Who will be responsible for the implementation and go live?
- Who will be informing customers of process changes that may affect them and the service they receive?
- How are they going to do it and what are their timescales?

These are all critical items that must be addressed during the groundwork phase. They will help you to ascertain if the project and outcomes are actually feasible and deliverable within your organisation.

Hash it out, involve employees and get their buy-in – but keep a clear project leader

Get the team together for a well planned, structured meeting to discuss the strategy and potential solutions, including the findings from your research.

Ensure you allow free discussion and probe business area leaders for their thoughts and opinions on how the plans will affect their teams and their work, encourage constructive criticism, this is your chance to identify potential pitfalls and plan for success.

Re-visit your Pugh Matrix and update any scores that the team have agreed to change, add any newly identified options and remove items that have been vetoed. Despite the need for collective input, it is pivotal to the success of your project that you have a key person leading things, responsible for delivery and standards from start to finish.

Be aware that one of the key reasons that automation projects fail is because the team fails to identify and maintain a single project leader.

Step

3

Select a solution

Look at the bigger picture

Make sure you have a solid understanding of the integrations that are available to you and how these will impact the wider business. Speak to your vendor partners to understand how they would recommend you tackle the automation.

Ask yourself, do you plan on changing any other aspects of your tech stack in the next few years? If so, you will certainly need to understand how this might impact your automated workflows and base your decision on a solution around this.

Cheap vs cost effective

Don't fall into the age old trap and get wooed purely by a low price!

Some solutions are very fairly priced for what you get and that's what you need to be aiming for: value for money over low cost.

Cost and functionality go hand in hand, they should not be considered on their own.

On the other hand, be careful not to be lured in by big brand names and their higher prices just because they seem a safe bet. Make sure you are working with a vendor that understands your sector and business size/makeup.

"The old adage that you get what you pay for is broadly true. But if you're specific about the features you need, you can make a decision on not paying over-the-odds for features that you may never".

— Richard Tubb, IT business growth expert

Choose for the future not just the here and now

Ask your vendor partners about their product roadmaps (many vendor partners regularly publish their roadmaps publicly) and how they see them applying to you and your business over the coming years.

Find out your vendor partners' focus on research & development (R&D) and discuss any future portfolio releases that could complement your setup.

Salespeople should be able to have an in depth discussion with you about how their solution will grow with your business. Ask them for their opinions and utilise their experience of working with your peers on similar projects, you'll likely get some new ideas!

Step

4

Don't try to run before you can walk

Data at the ready – the big information clean up

A common mistake for many, and a reason that a significant number of automation projects fail is that businesses fail to draw upon the right information to 'make things work'.

There are often information gaps where businesses lack credible data to make automation work correctly, it is therefore critical that your data is:

- Credible
- Correct
- Of a good size to accurately represent what it is you are wanting to show

Without these, despite how 'simple' your automation project is, it will fail.

<https://www.business2community.com/customer-experience/3-tips-for-getting-customer-services-house-in-order-for-ai-and-automation-02287732>

Identify human break points

Although automation is designed to remove the need for human intervention, it still requires regular monitoring and maintenance.

“Automation is not about setting and forgetting. You should regularly monitor automation systems to look for problems and opportunities for improvements.”

– Richard Tubb, IT business growth expert

The clean up and creation of new processes is something your team will need to focus on, they will need to understand where responsibilities transfer and what an escalation process looks like.

Once these responsibilities have been defined, you can begin to pinpoint potential break points and address these with guidance, training and role amendments.

Keep the experts in control

Don't hand things off to junior team members once the first stage is completed, this really is just the tip of the iceberg.

It is thought that many automation projects fail because businesses rush to take their experienced staff away from the 'completed' project in favour of them doing something more profitable.

Unfortunately, this often results in a false economy and sees fault lines in the new process going unnoticed, errors occurring and bad experience being passed on to the customer.

To avoid this, design a thorough implementation and hand over process that identifies crucial phases. Choose a project management methodology carefully and stick to it.

If you are confidently able to identify all phases, you could adopt a waterfall approach, if you think the project will be more fluid, you may want to consider the more flexible Kanban approach.

Step

5

The Go Live

Make your customers aware

Get your customers in the know as early as possible. Let customers know what you are doing and how it will impact them positively.

If the automation project is going to boost efficiency and profitability, then share this with clients!

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Let clients know that any cost savings and increased team ability will be passed directly on to them.

Pitch your project to your customer base as an additional benefit to them, warn them about potential issues and thank them for their support. This way, they will be understanding and accommodating as you implement and go through inevitable teething problems.

Experience tells us that the MSPs that try to change business processes 'on the down low' always get found out! This can end up leaving a bad taste in the mouth of the customer.

Don't go live before you're ready, but don't expect to be issue free at first

Project success isn't determined instantly and no project launches without areas for improvement so, if you encounter issues post go live, don't play the blame game and don't be disheartened.

These issues are fixable and simply help you to identify key focus areas.

Keep up with the testing

Make sure your project team is continuing to monitor the success of the automation solution and strategy, measuring it against previous KPIs and maintaining a constant understanding of how well it is performing.

Mark your set up against your initial objectives and you can begin to measure success. Use previous KPIs as benchmarks to understand the enhancements in productivity and efficiency and track these over a given period of time.

“With 40% of business productivity being lost to task-switching and 30% of IT employees' time spent on basic low-level tasks, automation offers more opportunity than ever.”

— Richard Tubb, IT business growth expert

Some KPIs you could measure include:

General Business

- Administrative Expense
- EBITDA
- Monthly Recurring Revenue (MRR)
- Net Operating Income
- Product Margin

Service Delivery

- Agreement Profitability
- Average Response Time
- Billing Resource Utilization
- Client Effective Rate (CER)
- First-Time Fix Percentage
- Outstanding Issues
- Service Department Profitability
- Service Utilization
- SLA Compliance
- Tickets Opened vs. Tickets Closed

Sales

- Sales Expense
- Time to Deal Closure

To get a more in depth look at how IT Glue will support the implementation of automation in your MSP, register for a one-to-one demo.

Get a Demo Today!