



 eBook

8 ways to take control of your business: choosing the right support tools

Whether you're just starting out in the IT service business or you're trying to expand, choosing the right tools can make your life much easier and your business more successful.

You may be tempted to reduce costs with free tools, but your business will grow faster with professional, paid IT support software. And frankly, you would likely outgrow free software quickly.

When it comes to choosing the right support software, we want to give you some guidance. In fact, we'll cover eight tips to help you find the right vendor.

1. KNOW WHY THE RIGHT TOOLS MATTER

Anyone who's ever had to tighten a screw knows the importance of having the right screwdriver. The correct tool can save you hours of frustration (especially when putting together something like furniture, with complex instructions).

The same goes for your IT support tools. You want to choose something that's both robust and easy-to-use. Here are a few things to consider:

- » **Longevity:** Choose a vendor who will be around for a while. You don't want to get stuck using software that won't be supported months or years down the line.
- » **Growth potential:** As your company grows (and your client base with it), you'll want to have tools that can grow with you. Make sure anything you purchase works as well for a small client base as it does a large one—or ensure it can be easily upgraded as your business grows.
- » **Integrations:** Even if you don't need additional tools now, you will in a few months (or years). Your IT support software should be able to integrate with other tools, like your RMM platform or your backup solution.



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2. KNOW YOUR CUSTOMERS' NEEDS

Clients are diverse, and so are their IT needs. Law firms have different requirements than dentist offices. Fashion retailers will have different IT setups than restaurants. And each business will need different levels of support, as some may have tech-savvy users while others may struggle with a tech-resistant workforce.

These differences determine hardware setups, software configurations and packages, and overall security requirements. Before you choose your IT support tools, consider the following:

- » **Review your security policies:** When you look at your customer base (or prospect list), double-check any security regulations that may come into play. Some companies may have to follow specific guidelines for firewalls, passwords, remote session security, and encryption.
- » **Choose how to support them:** Make sure you can provide the amount and type of support your customers need. Some may only want break/fix, but others will realize the value of fully managed IT services. Your support tools should be flexible enough to accommodate any option.
- » **Decide how you will communicate:** Figure out the best way to facilitate clear communications with your customers while you're supporting them. Consider adding in chat, background IT management, remote access, and VoIP.

3. REINFORCE THE SALE

IT service businesses face a catch-22. If systems work smoothly, your customers won't see you. It's only when things break down that customers need face time from their IT services providers. The best IT providers are often "out of sight, out of mind," which can mean customers don't always see the value of their services.

So make sure you communicate value to customers at the right times.

Whether you're providing break/fix or fully managed IT services, providing monthly communications that show exactly what you provided to the customer can reinforce your value. Choose a help desk that can do this via automated reports or itemized invoices so customers know what they get every month.

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4. STRENGTHEN THE RELATIONSHIP

Your IT support tools should make it convenient for customers to reach you and simple for technicians to fix issues from afar. When employees can quickly solve problems, you build trust between your IT business and your customers.

- » **Make yourself easy to reach:** Give your customers methods to quickly reach you, like an icon on their desktop, a help portal where customers can submit a ticket, as well as email and phone access.
- » **Simplify your technicians' lives:** When working on a problem remotely, technicians should be able to seamlessly provide support and communicate with the customer—whether via chat, phone, or VoIP. Additionally, your remote access tools should include critical features, like CMD shells, the ability to reboot in safe mode, in addition to keyboard and mouse mapping and blocking features.
- » **Think about site visits:** Choose a help desk that provides mobile access for people in the field. Techs should be able to see all device specs, ticket histories, software versions, and customer information right from their mobile devices. Also, make it easy for techs to accurately account for their time with simple application timers they can start and pause with one click.
- » **Centralize your help center:** Additionally, choose help desk software that lets you create a central portal to allow customers to submit tickets, view ticket histories, and read help articles.



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5. CONSIDER BOTH COST AND VALUE

When you choose a mobile device, the options can be overwhelming. A no-name phone may seem to have all the features you need at a cheap price, but if the user interface is unwieldy and difficult to learn, you may be trading saving a few dollars with your own time and frustration. Well-known manufacturers earn their reputations with customer service and quality products that justify a slightly higher price.

The same goes for IT support software. Cost obviously matters—but you don't want to pick a cheap option that slows your business down or makes you look bad in front of customers. That said, consider the following:

- » **Company and brand:** Choosing established brands comes with some benefits—you can be fairly certain they'll be around for a while and will continue supporting products. Plus, you can shop around and get information on more than just features, learning about what others say concerning their products, customer service, or ease-of-use.
- » **Features:** Here's what you don't want to do—select a product based on a feature checklist. Instead, leverage demos and trials to make sure that the features actually work well and are simple to use. Two products may check the same features on their web page lists, but how they're implemented matters more.
- » **Scalability:** This is another benefit of choosing a brand name—the tools can often grow with you. Large vendors often provide sophisticated feature sets and have expansive infrastructures that can support your needs as your business and client base expands.
- » **Price:** Don't consider just the sticker price—look at the pricing model as well. Do they charge a fee per device or per user? Is support included? Can you call someone directly with questions?

6. SIMPLIFY BILLING

You probably want to get paid. Unfortunately, end-of-the-month billing often brings headaches. But your IT business software or help desk can automate much of the process, reducing many of the major obstacles you would face each month.

Look for tools that include:

- » **Automated time and expense tracking:** Accuracy matters. Often, technicians can get so deep into solving a technical problem, they forget to track their time. If you can automate the process—through ticket timestamps or timers—you'll have a more accurate picture of work at the end of the month.
- » **Accounting integration:** Your help desk should be able to easily export billing data to your accounting software. This will save hours every month and reduce potential errors.
- » **Service histories:** No matter how accurate the billing, customers will, at some point, question you about invoices. Make sure your help desk software gives you details on service histories so you can resolve disputes gracefully.



7. CHOOSE RELIABILITY AND SECURITY

As an IT provider, you offer your customers maximum uptime and security. You should demand the same from your IT software vendors. These days, you simply can't afford to choose IT support tools that could leave you open to downtime or a data breach.

- » **Reliability:** To help ensure you choose software with maximum uptime, double-check reviews and see if their websites offer any guarantees or SLAs. When it comes to remote access software in particular, look for a vendor that has high-speed relay servers around the globe, so you know you'll always be able to connect quickly.
- » **Security:** Choose support software that has the highest levels of data security built in. Ideally, all data should be encrypted both in transit and at rest, and passwords should be protected with two-factor authentication. Access PINS should automatically expire for maximum customer safety.

8. GAIN VISIBILITY

Your IT tools, especially your help desk, should give you complete visibility so you can manage your business more effectively. Look for software that can give you clarity on:

- » **Customers:** The system should tell you how customers use their devices and what kind of issues are common. Not only will this allow you to develop mitigation plans for any problem devices, it will also help you determine if you're under- or overcharging your customers.
- » **Technicians:** When your help desk can give you "at-a-glance" visibility into technicians' productivity, you can improve your efficiency without having to micromanage your employees.
- » **Workflow:** Look for tools that provide insight into your complete business processes. Make sure your help desk can assist you in identifying issues like bottlenecks or skill gaps in your workforce.

Of course, it's not just the information that matters—you also need to account for the way the system gives you information. Look for software with clear dashboards that provide a high-level overview, but also allow you to drill down for more information if you need it.

PICK THE RIGHT VENDOR FOR YOUR BUSINESS

IT support tools are an investment—choosing the right ones require you to put in the research legwork. But doing this work will pay dividends down the line. Even free tools carry costs when you consider the lost time, lack of reliability, and even potential security issues.

So don't skimp on your support tools. When you pick the right help desk and remote access software, you and your employees can be far more effective—and that efficiency carries over to a healthier bottom line.

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