



5 Steps to Take Backup from
Good to Great

5 STEPS TO TAKE BACKUP FROM GOOD TO GREAT

If you've been in the IT service business for a while, you're likely have the basics down for backup. You probably have some revenue coming in from the service, and you might even have saved your clients a few times from severe data loss.

In short, you're good at backup. But what would make you great? No matter where you are now, there's always room to improve. Maybe you need to boost efficiency so you can reduce the cost of providing backup services. Or perhaps you have a hard time convincing prospects to invest in regularly tested, proactive backup services.

Regardless of how good you are now, you probably still have challenges to overcome. For instance, restores could be a nightmare if your software doesn't give you enough granularity and flexibility to adequately address critical needs. Or maybe your team's losing productivity by having to deal with multiple backup solutions for different clients.

When it comes to backup, there are a few challenges that consistently crop up for MSPs:

- **You haven't cracked the code on selling backup:** Every MSP owner dreams of generating tons of revenue from a given service (backup included). But backup tends to be a "just in case" service that customers put off purchasing, as they don't see an urgent need.
- **Your backups are limited in scope:** Many clients simply want to back up a single critical server. This won't protect their endpoints from issues like ransomware attacks or even human error (which is extremely common).
- **You've inherited backup:** Rarely, if ever, do you talk to a prospect who has nothing in place or wants to completely change their system. If you find one, great! Your life will be a lot easier. But more often, customers already have a mixture of existing solutions in various states, making managing backup across clients a drain on your overall efficiency.

"The goal of every MSP should be predictability."

If one or more of these issues have you nodding your head, you're not alone. Many MSPs haven't quite mastered their backup line of business. The key is to determine how you can properly structure your service offerings, improve your efficiency, and provide service that keeps your customers happy all at the same time.

The goal of every MSP should be predictability. That means predictability in what services are offered, how services are delivered, what time investment is required, and what kind of revenue to expect. If you're still living in a break/fix world, then likely have some work to do to make your business more predictable. If that's the case, backup can be a great next step.

SO, WHAT WILL IT TAKE TO MAKE YOUR BACKUP SERVICES GREAT?

In this white paper, we'll help you solve the common challenges by providing five steps to make your backup services predictable and *great*. Even if you're already good at backup, you'll learn something to take it to the next level. Each step is based on best practices used by today's most successful MSPs.

We'll start off by talking about the foundation of good backup and what you need to do to maximize backup efficiency.



01

ADDRESS THE LACK OF BACKUP EFFICIENCY

Your customers have expectations about your ability to recover in a disaster. Some may simply say, “just get everything up and running,” without worrying about the details. Others may be more sophisticated, with plans around specific data, applications, or systems. Regardless, every customer expects you to be able to fix their network if it fails. And they expect you to do it quickly. If you can’t, your clients lose faith in your abilities.

If you can’t restore quickly, it’s likely due to backup inefficiencies. In this case, either you don’t have the right backup solution in place or you don’t have the best backup strategy.

Let’s look at each issue and how to overcome them to build a solid backup foundation for your business.

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“In short, try to get all your customers on a single, feature-rich backup product.”

CHOOSING THE RIGHT BACKUP SOLUTION

Remember that your goal should be to make your backup business predictable. If you have to support multiple backup solutions across multiple customer accounts, you increase the number of variables that can slow you down. Some customers back up to tape, some to disk, some to the cloud. Some use file-based backup while others use image-based. Some solutions are aware of your customers' critical applications and others aren't. Some recover on-premises and others restore only to cloud-based destinations. There are simply too many variations to cover if you don't have some form of centralization.

This has a tangible impact on productivity and efficiency. For example, let's say you're in a recovery scenario. Before you can restore, you have to review how the backups were run and locate which backup holds the needed data set. Only then can you start recovering.

Also, some solutions do not provide the backup and recovery granularity needed to perform efficiently. For instance, if a solution only does image-based backup, you may be required to go through the full process of restoring and mounting an image simply to recover a single file!

WHAT SHOULD YOU LOOK FOR IN A SOLUTION TO IMPROVE EFFICIENCY WHILE ALSO MEETING CUSTOMER NEEDS?

When evaluating backup solutions, make sure you pick a product that can meet two important requirements.

First, the solution must centralize management. On-premises backup products run on a single laptop or desktop. To manage, you must remote control into that device. If you have 50 customers, that's 50 individual endpoints or servers you have to remote into to run backup. And each likely has a different configuration and setup.

Instead, the right product lets you centrally manage all your customers' machines from one place. From a single dashboard, you should be able to view all customer machines and backups, roll out changes to multiple devices en masse, and run restore operations remotely. Frankly, one software platform should let you manage every aspect of backup and recovery for all your customers.

In short, try to get all your customers on a single, feature-rich backup product. It may take time and effort to persuade customers to switch, but the efficiency gains are well worth the effort.

Second, make sure your backup product can meet the **3-2-1 backup rule**. This industry best practice requires you to:

- Keep at least **three copies** of a data set (note: one can be your live copy)
- Store backup copies on at least **two different media** (e.g. tape and disk)
- Keep **one** of the backup copies off-site (whether it's off-site physical storage or cloud storage)

The 3-2-1 rule doesn't specify what technology you need to use. How you achieve this is flexible, but make sure the backup software you choose allows you to implement this best practice.

It's not enough to simply put every customer on a single, likely cloud-based, backup solution. You also have to ensure the backup sets you generate will actually protect your customers.

HAVE THE RIGHT BACKUP STRATEGY

In addition to the 3-2-1 backup rule, you want to make sure your backup approach accomplishes the right goal. Successful MSPs don't think backups are merely extra copies of their customers' data; they know the real goal is disaster recovery. So you need to focus on what you'll do to quickly restore business continuity after a disaster, rather than simply focusing on restoring a specific data set.

Begin by defining the disasters most likely to affect your clients, then build

your backup strategy back from there. A disaster can be as small as a deleted file or as large as a hurricane wiping out an office. It's important to pick your battles—choose only the most likely scenarios to avoid adding complexity.

Finally, make sure to think of backup as a daily practice. Check your backup job notifications each day to ensure everything's running smoothly. Make sure to validate the data. And don't forget to periodically do recovery planning with your customers.

When you perform these tasks with regularity, you dramatically cut down on recovery times. If disaster strikes, you'll know exactly which backup will address the data loss incident.

Even if you can't implement all of these best practices, putting just a few in place can move you toward greater backup.

“Make sure to think of backup as a daily process.”



02

PROVIDE STRUCTURED & SIMPLE SERVICE OFFERINGS

The most successful MSPs keep their service offerings simple for two reasons. First, customers often get sticker shock when they don't have a full appreciation of an IT service's value. Second, complex pricing structures that give too many options can confuse prospects, potentially costing you a sale. So, keep your backup service offerings simple, and make sure to structure them in a way that conveys both the value and the associated costs.

The first step is to shift completely away from reactive restores to focus only on proactive, managed backup and recovery. This makes your backup offering predictable, elevates your company from break/fix to a strategic partner model, and provides your customers with the greatest levels of data protection.

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The key is to use a pricing model that's easy for prospects to digest. A three-tiered "good-better-best" model works beautifully. Make sure your pricing model and documents convey the data sets you plan to back up, the backup frequency, testing frequency, and recovery service levels for each tier. Take the following as an example:

	GOOD	BETTER	BEST
Data Sets Included	Servers – System Only	Servers – System and Critical Applications	Servers – System and Critical Applications, Workstations
Backup Frequency	Daily	Every 4 hours	Every 2 Hours
Testing Frequency	Annual	Semi-Annual	Quarterly
Virtual Recovery Environment	No	No	Yes
Recovery SLA	RTO – 24 hours RPO – 24 hours	RTO – 8 hours RPO – 4 hours	RTO – 4 hours RPO – 2 hours
COST/MONTH	\$XX/month/server	\$YY/month/server	\$ZZ/month/system

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03

LEARN HOW TO SELL BACKUP

Backup is a unique beast. For most IT services, clients can see staff actively working on tasks, which clearly demonstrates the value of the service. And in many cases, the work produces a tangible result, such as a new workstation or an application fix. This makes it easier to sell, as you simply have to ask them to pay you for work that produces an immediate result.

But backup is less concrete. To many, it's a "just in case" rather than a "must have." So, the pitch sounds a bit more like, "should something bad happen, you want to have extra copies." Instead of a tangible result, you're asking them to calculate risk in their heads. If not communicated properly, backup seems less like a need and more like a nice-to-have.

"If not communicated properly, backup seems less like a need and more like a nice-to-have.."

SO, HOW SHOULD YOU SELL BACKUP?

When selling backup, focus on the value provided rather than the technical details. Telling them you'll back up a specific server X times per week will backfire. Instead, center the conversation on what the client truly gets out of your backup service. Try the following:

- 1. Don't focus on FUD:** This refers to the concept of selling via fear, uncertainty, and doubt. Many MSPs try to scare clients into buying backup, telling them they'll lose everything if they don't. FUD sets a negative tone that could distract from the value of the service. Don't completely avoid the negative, just make sure not to focus on it exclusively.
- 2. Discuss the risks of not taking backup seriously:** While you want to avoid using too much fear, you still have to talk about the risk to the prospect if they underestimate the dangers of a disaster scenario. The truth

is that downtime is bad for business. So, make sure to talk with them about what downtime could look like. Find out which systems and data they value most. Talk to them about the potential disasters that could occur, from accidentally deleting a file to a ransomware virus all the way to a fire or flood. Then, help them figure out what the cost of downtime would be in those scenarios. This lets you get to the deep, true concerns of your potential client and keeps the conversation focused on them. If possible, try to get the customer to define the price tag if the business is down, data is inaccessible, or a critical application is unavailable for an hour, day, or week.

MEET THE 3 - 2 - 1 RULE

- Three copies must exist
- Stored on at least two different media (e.g. tape and disk)
- With one located off-site

- 3. Discuss the business value of backup and recovery:** Once you know what disasters most concern your client and which systems are most vital to protect, you can talk about how your backup services help. Focus on how you can quickly return them to an operational state after a disaster. You can also focus on the value of having regular, tested backups tailored to specific disaster scenarios. This should help you overcome objections they might have to taking on another service.

- 4. Compare your service's cost with the value it provides:** After you've led the customer through the potential cost of downtime or lost data, you can get down to brass tacks and discuss price. If you've nailed the rest of the conversation, then this part should allow the prospect to naturally conclude that the cost of downtime or data loss more than justifies the cost of your service.

Once you have the customer sold on the need for ongoing, proactive backup services, you'll need to either fit them into your existing service levels or create a custom offering. But remember the second step: keep your offering simple. Crafting a complex service offering to make your customer happy puts you in a position to over-promise and under-deliver. That's a recipe for angry clients, inefficient service, and, ultimately, lost money.


04

HAVE DOCUMENTED, REPEATABLE PROCESSES

Predictability is impossible unless an MSP has a firm grasp on the hours required for certain tasks and the revenue they will generate. Mature MSPs create processes that let them control their customers' environments while minimizing the number of hours spent on one-off requests.

Having documented processes that can be repeated easily across your business will increase your response time, lower your support costs, and ultimately minimize your customers' downtime.

“When selling backup, focus on the value provided rather than the technical details.”



“By using a single product to manage all your customers’ backups, you can more easily standardize the entire process.”

So where should you start?

- **Having a centralized backup solution:** By using a single product to manage all your customers’ backups, you can more easily standardize the rest of the process. This saves your technicians time, as customers can have identical configurations and testing documentation. This is the foundational element that lets you be consistent through the rest of your backup service.
- **Consistent backup processes:** If you use a tiered offering model, you can implement identical backup jobs (names, frequency, data selection, etc.) and alert settings. This way you know what to expect for each customer without needing to look at their environment—and you know you’ll be alerted should something go wrong.
- **Consistent testing:** If you offer backup testing, make sure to establish and document a standard testing procedure. With only a few tweaks, the same document can likely be used repeatedly across your entire customer base.
- **Predictable recovery:** When you know that backups have both been run and properly tested, you’ll run into fewer issues when recovering.

05

DELIVER BACKUP SERVICES USING FULLY INTEGRATED TECH


We've already covered the importance of centralized management. In addition, successful MSPs look for backup tools that easily integrate with other solutions. Wherever possible, you should try to find products that fit together and speak to each other, allowing you to automate much of the support, reporting, and billing involved with backup and other IT services. This creates an environment where your team can be more productive and efficient.

Take the simple example of a backup job failing. Every backup solution today has some form of notification, but for your business to keep track of the work performed, you need a help desk ticket generated. If you can

integrate your help desk and your backup product, you'll automate this process. This provides more value than a simple email notification as a help desk solution can automatically escalate the ticket if the initially assigned tech is unresponsive. That means faster response times and happier clients.

You've likely already invested in other toolsets. So, try to find a backup product that can hook into your existing help desk, remote monitoring and management product, or even your billing solution. Every integration point you take advantage of is another step toward efficiency, productivity, and predictability.

“Successful MSPs look for backup tools that easily integrate with other products.”



“Great MSPs have an efficient, productive, and predictable backup business.”

TAKING BACKUP FROM GOOD TO GREAT

No matter how good you are at backup, odds are you can always improve. The suggestions in this white paper were distilled from our years of experience serving and working with the most successful MSPs. By taking your cues from them, you can improve your clients' protection, cut down on your own support costs, and build stronger, continuous revenue streams.

Great MSPs have an efficient, productive, and predictable backup business. By following the five steps in this white paper, you'll put your organization in a better position to succeed in both earning more revenue and in providing better service and protection.

Nearly every part of this paper was about changing the way you approach backup. By switching to centralized management, using simple and structured service offerings, running repeatable and consistent backup jobs, focusing on value in your sales conversations, and using integrated solutions, you improve your brand and provide far more value to your customers.

In short, if you follow these best practices, you can take your already-good backup service to great.

GETTING YOUR BACKUPS TO GREAT FYI - THIS IS

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