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MSP Guide to Automating Your Business for Profitability

Competition in the MSP space continues to grow, exerting downward pressure on MSPs' pricing models and profit margins. To help counteract this trend, it has become increasingly important for MSPs to maximize efficiency in their business operations across all the services they offer to clients. Not only will this significantly reduce their operating expenses and boost their net profits, it also enables MSPs to enhance the quality of those services they provide.

This latter point is particularly important, as delivering superior services is key to ensuring customer satisfaction and the consequent long-term relationships that enable MSPs to lock in predictable, recurring revenue.

Why Automation Is the Solution

One of the most effective ways for MSPs to increase operational and management efficiency is to introduce automation into their workflow. At its core, the value proposition of automation is straightforward: reduce the amount of time technicians spend handling routine tasks, cutting the costs for service delivery and freeing up technicians to devote more attention to revenue-generating activities that will boost the MSP's profitability.

While the fundamental advantages of automation are universally applicable, the ways in which automated solutions are incorporated into each MSP's environment are more specific. As every business model is unique, with its own particular blend of services and processes, the implementation of automation can vary. By following the steps listed below, virtually all MSPs can streamline their deployment of automation solutions.

STEP

01

Determine Functions to Automate

To take advantage of the benefits that automation can deliver, MSPs need to first evaluate their business and identify areas that are most amenable to automated operation.

Obvious candidates for automation include internal processes that are ongoing and repetitive by nature. Software updates and patches, regular disk cleanup, and frequent backups are examples of routine maintenance tasks that readily lend themselves to automated control.

In addition, customer-facing functions such as reporting and ticketing can also be easily handled through automated services. Tickets can be rapidly routed to the appropriate technician, ensuring faster resolution of clients' technical issues, boosting customer satisfaction and retention. Automation also simplifies the generation of reports, both for internal use and for reports submitted to clients.

These reports to customers are particularly useful to remind them of specific services the MSP has provided (along with compelling statistics such as the total system uptime the client received), reinforcing the value of those services and helping to keep the benefits of partnering with the MSP top of mind for clients.

STEP

02

Adopt Automation to Deliver Proactive Services

By adding automation tools and other support apps, MSPs can provide a wide range of proactive services to clients that demand only limited manpower. For example, remote monitoring and management (RMM) tools enable smaller MSPs to automatically perform a variety of diagnostic and preventative maintenance routines, ensuring potential difficulties are identified before they become major problems.

This level of automation pays dividends in terms of boosting customer satisfaction and loyalty. Moreover, it can significantly cut costs by preventing issues from developing into tickets that will consume valuable technician time.

In addition, professional services automation (PSA) tools make it easy for technicians to remotely enter their time when they complete onsite services, ensuring that work is accurately tracked and recorded—key for an MSP to calculate their true cost of delivering services. When a PSA tool integrates with an RMM platform, even greater automation is possible, including immediate generation of tickets when alerts are detected.

STEP

03

Manage Dynamic Cloud-Based Solutions

Automation solutions like RMM and PSA tools can enable MSPs to seamlessly manage dynamic cloud-based solutions, freeing MSPs from the limitations of employing a fixed set of assets. While RMM and PSA integration with cloud services is an evolving process, the benefits of melding these automation tools with the cloud are undeniable.

Most compelling is the flexibility that automated cloud-based solutions provide, enabling MSPs to dynamically scale the breadth and depth of their client services almost instantaneously in response to the changing needs of customers. For instance, MSPs who leverage a cloud-based endpoint security solution like Webroot can take advantage of its built-in integrations, saving the MSP from the headache of curating a suite of products that are compatible with one another.

Other high-value, cloud-based services that many MSPs automate are backup and business continuity solutions. Many forms of malware – and ransomware in particular – punish businesses that don't take backup seriously, and can have disastrous outcomes if and when an infection gets through. Today, backup services are fast, affordable, and can easily be fully automated, dramatically reducing downtime when clients get infected.

Today's combination of automated solutions and dynamic cloud services enable MSPs to select from an array of cloud solutions for each client while ensuring management of multiple solutions is efficiently automated. The net result is that clients always receive the service levels their businesses demand, while MSPs boost their profitability by only paying for capabilities they actually need.

STEP

04

Automate Routine Tasks with APIs and Scripts

To further expand the benefits of automation, many MSPs are taking advantage of the increased flexibility that Application Programming Interface (API) and scripting tools offer. Enabling MSPs to drill down deeper into specific functions of their software solutions, these tools make it possible to automate commands and processes on a more granular level.

One of the most common uses for APIs and scripting is automating deployment of software solutions for new customers who are being on-boarded. The ability to install hundreds, even thousands, of endpoint clients with a single click yields an enormous cost savings for MSPs in terms of reduced technician time. As MSPs continue to grow and take on even larger clients, the dividends of automated deployment will only increase.

A growing number of MSPs employ automation tools to create customer billing statements and generate professional services reports. This is another example of automation relieving MSP staff members from performing tedious and time-consuming tasks. Furthermore, automated approaches enable MSPs to track their billable services more accurately and eliminate billing errors.

While it's clear that automation enables MSPs to increase productivity, reduce operating costs, and boost profitability, there is another benefit to automation that is important to note—it gives MSPs more time to focus on customer support and satisfaction, key to building the stronger relationships that foster long-term customer patronage and sustained profitability.

Example of API Functionality

Example of API Functionality

An instrumental part of achieving the full benefits of automation is the availability of APIs for software solutions. Such APIs are key because they enable information to be seamlessly moved between those solutions.

For example, the Webroot® Unity API enables MSPs to access additional Webroot endpoint data and services via the Global Site Manager (GSM) console. The Unity API includes a variety of capabilities such as:

- **Console access:** Acquire access to GSM console environments
- **Console GSM:** Create endpoint protection sites, list policies and admins for a given GSM key, and manage endpoint protection sites given a specified GSM key and a site identifier
  - *Site management:* Lists, creates, deactivates, suspends, and resumes sites
  - *User management:* Lists users, adds users to a site, and modifies access permissions
  - *Policy management:* Lists global and site policies
  - *Group management:* Lists, creates, edits, and deletes groups
  - *Endpoint management:* Lists endpoints, moves endpoints to a new group, applies new policies, and de-/reactivates endpoints
  - *Command management:* Lists and issues endpoint commands
- **Threat history:** Get granular historical information on threats for one or more endpoints
- **Health check:** Verify the general health of a Unity API service instance and retrieve service version information

STEP

05

Automate Post-Sales Communications

While automation can obviously play a role in boosting operational and management efficiency, it also offers significant benefits in terms of enhancing sales and marketing effectiveness. It is vital that MSPs cultivate close relationships with their customers in order to ensure the recurring revenue stream that provides the foundation for MSP profitability.

To strengthen customer relationships, salespeople can use automation to personalize marketing and sales collateral for existing clients. Post-sales communications that target customers' specific business challenges show the MSP is aware of — and actively engaged in solving — those challenges. Such customized marketing efforts help remind clients the MSP is committed to strengthening relationships long after the initial sale has been made.

These post-sales communications can take many forms: customer satisfaction surveys, requests for feedback on specific solutions the MSP offers, newsletters that offer useful tips and advice on IT challenges customers may face. These tactics can help MSPs stay top of mind with their clients and increase customer retention.

Not only does automation enable sales and marketing teams to create more personalized and compelling content for existing clients, it helps them do it very quickly. This in turn frees up more time they can use to drive marketing and sales initiatives for new prospects as well. Automation is equally effective in this role, significantly streamlining processes such as lead generation, lead scoring, lead nurturing, and lead routing.

Conclusion

Of all the assets that MSPs must successfully manage in order to be profitable, the most important is time. As the MSP marketplace becomes more competitive and margins tighten, MSPs must find a way to reduce costs without diminishing service quality for their clients. The solution comes in the form of automation, which enables technicians to actually improve service quality for customers while significantly reducing their time spent supporting them.

The net result is lower costs for MSPs. Even more critically, those lower costs lead to higher customer satisfaction and drive long-term MSP profitability.

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Learn more about how Webroot lowers costs and increases margins at **webroot.com/msppartners**

About Webroot

Webroot delivers next-generation endpoint security, threat intelligence services, and anomaly detection solutions to protect businesses and individuals around the globe. Our smarter approach harnesses the power of cloud-based collective threat intelligence derived from millions of real-world devices to stop threats in real time and help secure the connected world. Our award-winning SecureAnywhere® endpoint solutions, BrightCloud® Threat Intelligence Services, and FlowScape® solution protect tens of millions of devices across businesses, home users, and the Internet of Things. Trusted and integrated by market-leading companies, including Cisco, F5 Networks, Aruba, Palo Alto Networks, A10 Networks, and more, Webroot is headquartered in Colorado and operates globally across North America, Europe, and Asia. Discover Smarter Cybersecurity™ solutions at www.webroot.com.

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