The Ultimate Guide to As-A-Service
Step-by-Step Advice for Empowering Your Technology Solutions Business
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Adding to Your Service Offering is Challenging.

We get it. ConnectWise Inc. has helped countless technology professionals reconfigure their businesses for the future by adding new practice areas and building monthly recurring revenue. The Ultimate Guide to As-A-Service will help you navigate these important business expansions with confidence.

This guide covers everything from business planning to client retention. Read it from cover to cover or jump to what interests you by clicking through the contents.
PART 1

WHY EXPAND YOUR SERVICE OFFERING?
What’s the Big Deal About As-A-Service?

If you sell, service, or support technology, you’ve probably been hearing a lot about the commoditization of IT and the need to compete with an as-a-service approach. And you realize that creating new practice areas would mean great opportunities for your business.

Is it all a Bunch of Hype?

No, it’s definitely not hype. Affordable technology is changing the way businesses of all sizes and industries operate. Your customers are starting to understand the competitive advantage that technology can bring, even if they aren’t highly technical. They need more than a support tech; they want a trusted advisor who can help them translate their business objectives into reengineered processes and new technology solutions.

Think of the as-a-service model in terms of bundling together the hardware, software, services, and support that your clients need and then charging them a flat monthly fee for the entire package.

It’s not simply selling clients an extended maintenance contract. In fact, as-a-service is your opportunity to prove your value to clients and serve as a trusted subject-matter expert.
As-a-service is probably the most fundamental change to the technology professionals business model in decades. It’s critical that you get it right, and that you get right on it. Your competitors may be expanding their service offering already, so there is no time to lose!

**What Will Adding New Practice Areas Do for My Business?**
Among many other benefits, moving your clients to the cloud with software-as-a-service (SaaS) and hardware-as-a-service (HaaS) will help you develop a stream of predictable revenue that makes your business more competitive and profitable.

**Having More Practice Areas Makes Your Business More Competitive.**
With more practice areas, you can count on recurring revenue month over month and year over year. Cash flow is finally steady and improving all the time. You don’t have to stress about payroll and other expenses, so you can put your energy toward more strategic business-building activities. Having a steady income liberates you to take risks and get more aggressive with your business plan. Create new practice areas for new or existing markets in your customer base. Go after larger, harder-to-land clients. If you miss a sales target one month, your cash flow remains unaffected!
In the Long Run, More Practice Areas Will Make You More Money.

Over time, when you add up all of the payments from your practice areas, you can expect to make more money on this model than one-time projects or installations. You’ll also raise the lifetime value of your clients, and because clients stick with you and pay month after month, all new sales are additive. By trading some cash up front for greater long-term profitability, you’re truly growing your business. For a more in-depth look at how the numbers might play out in your business, read this article by Mike Monocello in Business Solutions.

Practice Areas with the As-A-Service Model Reduce Customer Churn.

An as-a-service business model enables you to become much stickier with your clients, or more essential to their business. While the rip-and-replace model of selling technology encourages customers to shop around for better pricing or features, the as-a-service model positions you as an indispensable partner to your clients’ ongoing success. Done right, it will help make your business too valuable to replace in your customers’ eyes.
Recurring Revenue Builds a Valuable Legacy When it’s Time to Exit Your Business.

Increasing the amount of monthly recurring revenue coming into your business raises the quality of your earnings and the overall value of your business. In business valuation, high-quality revenue—the kind of earnings that investors seek—is defined by three essential characteristics: predictability, profitability, and diversity. The as-a-service model builds predictable, recurring revenue. By expanding and standardizing your service offering, you can increase profitability through efficiency and automation.

Whether your exit plan involves passing your business to your children or selling it, more practice areas and predictable revenue build a legacy of value that you can take to the bank! Some professionals estimate that a business with recurring revenue is worth 16 times more than a one-time revenue model (such as rip-and-replace). Another recent article estimated that an owner can expect to receive 4 to 6 times EBITDA [earnings before interest, taxes, depreciation, and amortization] for a company on a one-time sales model, while owners with recurring revenue can expect a payday of 6 to 8 times EBITDA.

Transform Capital Expenditures into Operating Expenses for Your Clients.

In their personal lives, people are already accustomed to paying for products and services on a monthly basis. It’s easy for business owners to understand the same model for their business purchases, and monthly payments might fit better into budget plans. In today’s economic environment, small business owners may be reticent about significant capital expenditures on new software and hardware. The as-a-service model enables your clients to convert up-front capital expenditures into pay-as-you-go operating expenses. Spreading these costs across affordable monthly payments may help you close more deals.

Build a Business You Will Truly Enjoy.

Remember the dreams you had about living the good life and loving work? If you’re like most business owners, those dreams faded and running the business took over your life. Establishing practice areas with the as-a-service model can help you earn more and stress less, so you can finally enjoy the business and reap the benefits of your hard work. It gives you the freedom to find a better balance between work and your personal life. Spend more time on what’s important to you—working on your business, traveling, hobbies, or spending more time with family and friends.

Techvera, a North Texas IT solution provider, has practice areas that range from break/fix to managed services. CEO Reese Ormand reflects on the as-a-service model and how setting up monthly recurring revenue impacted his business after a full year. He says:

“I was able to replicate that same amount of revenue with five managed service clients, four to five times the margin at the end of the day.”

4 RetailNOW panel discussion
Add Services to Make Your Business Stickier.

Today’s modern businesses use technology to create efficiencies, and they need a go-to person to help them manage it all. Adding more services to your portfolio can help your business become that critical point of contact for your clients. Plus, it will increase your stickiness with existing clients and reduce the possibility that competitors can gain a foothold. Increase your value to your client by becoming a one-stop shop with each new service you add.

Create Multiple Touch Points with Clients by Providing at Least Four of These Products and Services:

- Software-as-a-Service (SaaS) for business applications
- Hardware-as-a-Service (HaaS) for PCs, laptops, printers, etc.
- Cloud services
- Remote Monitoring and Management (RMM) of hardware and networks
- Data backup/disaster recovery
- Mobile services
- Storage and antivirus
- Physical security monitoring systems
- Help desk support or premium 24/7 support services
- Vendor management
- Capacity planning
- Lifecycle management (warranties, expirations, and updates)
- Return Merchandise Authorizations (RMA)
- VoIP and WiFi
- Website development and maintenance
- Email, mobile, and social media marketing
- Digital signage
- Inventory management
- Reservation programs
- Loyalty programs
- Gift cards

Part 1  Why Expand Your Service Offering?  Continued

If you service the retail industry, you may also consider monthly services such as:

- Loyalty programs
- Gift cards

You don’t have to abandon existing practices or businesses. Instead, you can continue to open new business practices that transform your business. — Arnie Bellini, CEO, ConnectWise
PART 2

NAVIGATING CLOUD SERVICES AS A PRACTICE
Have Doubts About Offering Cloud Services?

When managed services was new in the industry, it was easier for technology professionals to jump on board despite the challenges of reorienting their business to take on a new practice area. This was because the benefits were clear from the beginning: a larger territory meant more clients, and more clients meant more profit.

Creating a new practice area for cloud services entails the same sort of challenge for technology professionals, except there’s a stigma surrounding the practice that managed services didn’t have. It’s harder to see the potential for profit because margins on cloud licenses are slim. This new environment also brings new challenges surrounding service delivery and billing. However, just because the benefits of cloud services may be harder to see, doesn’t mean they’re not there. The reality is that technology professionals have the ability to provide more value to their clients with cloud services, and can still make a profit.
Embrace the Change

We get it. Change is scary. Even with growing client demand for cloud services, it’s easy to get overwhelmed when you think about the daunting task of managing single tenants in an invisible and unfamiliar environment. But as frightening as the unknown might be, the rewards are well worth the risk where cloud services are concerned.

The cloud environment allows you the potential to create a global client base, and you can offer proactive services that will solidify your value to your clients with the same staff you currently have. That’s right. **You don’t have to change everything about how you do business or give up the areas you got into business for in order to accommodate the cloud. And that’s not all.**

Major players in the industry have seen this shift to the cloud coming and have created systems that will help take the burden out of managing, monitoring, and billing in the cloud for technology professionals.
Sure, things will be different moving forward, but change isn’t always a bad thing. If you’re ready to take on a new challenge with the potential to yield huge rewards, then follow this advice to prepare your business to do more than just weather the storm.

Is Your Business Prepared for the Cloud?
Almost a decade ago, most technology professionals were busy evolving their break/fix operations into highly profitable managed service provider businesses. Now the cloud is hovering over the IT industry landscape, and change is in the air once again.

Your clients have experienced anytime, anywhere ease of access and minimal downtime on their personal devices, and naturally want the same convenience and security for their business systems.

So, while this technological phenomenon isn’t new, it’s poised to change the way technology professionals do business, the same way managed services did, but on a new level.

Create a Cloud Services Practice Area
In order to be successful in the cloud, create a practice area dedicated to cloud services. Think of your portfolio as a menu of services for your clients and prospects. You wouldn’t put just one thing on a menu, so why stop at one service? Don’t limit yourself.

It’s estimated that by 2020, 50% of all SMBs will have moved their business systems into the cloud.  

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Instead of thinking of your business in terms of managed services or cloud services exclusively, think of it as a one-stop shop for your clients that includes all the technology services they’ll need to run their businesses.

**Want more details?**
*Check out our [5 Steps to Cloud Service Provider Success eBook](#)* where you’ll learn everything you need to know to start capitalizing on the cloud.

**Adapt Your Business Model**
You don’t have to change your entire business model to cope with cloud services. It’s possible to maintain your current practice areas and those clients that aren’t ready to move to the cloud yet, and still meet demands for prospects that are part of this widening market before your competition does.

**Consider the Following:**

1. Who are your target customers?
2. What is their perspective on cloud services?
3. How will they know you’re offering cloud services?
Part 2  Navigating Cloud Services As A Practice  Continued

Marketing
Spread the word about your new cloud service practice area!

Sales
Prepare your sales process for introducing the value of cloud services.

Purchase
Purchase your clients cloud licenses from their preferred trusted reseller.

Implementation
Implement their cloud licenses.

Support
Manage and proactively monitor your clients’ cloud licenses.

Billing
Automate the billing process with a cloud service solution.
Keeping their perspective in mind while you develop this practice area is crucial for meeting current and prospective customer expectations. Remember, don’t leave your prospects hanging after you’ve cultivated their interest in your cloud services. **Make sure you’re able to deliver on your promises throughout the entire customer lifecycle, because your ability to deliver efficient, proactive service will directly impact your profit.** Put yourself in their shoes and walk through each step of the experience from their point of view.

**Enabling Profitability in the Cloud**

Monitoring and managing an invisible environment presents a brand new set of challenges for technology professionals. And perhaps what’s more stressful is the fact that cloud licenses yield notoriously slim profit margins. That would make any technology professionals understandably hesitant about jumping into this uncharted frontier.

What do you do when the amount of time it takes to bill a client’s cloud license eats up your profit? How can you build enough revenue to make cloud services a worthwhile venture? Adopt a user-based billing model and establish monthly recurring revenue.

Automating your billing will help you avoid eating away at profits by drastically reducing administrative time.

**Here are Some More Tips to Help You Gain Control of Your Profits in the Cloud:**

- Tie cloud licenses to your existing user agreements to streamline your billing process
- Avoid the hassle of billing by device and embrace a user-based billing model
- Capture prorated billing with ConnectWise Unite™
Here’s the Big Question:

Are you willing to get left out of the biggest industry movement in a decade and let your competition take center stage, or are you ready to gain control in the cloud?

Set up your business processes to profit from cloud services, and seize this opportunity to further establish your business as a trusted technology advisor to your clients before your competition does.
PART 3

HOW TO DESIGN AN AGILE BUSINESS PLAN
Never Underestimate the Power of a Good Plan.

In order to successfully expand your service portfolio with new practice areas, you’ll need an agile business plan to prepare your company to quickly adapt to meet new client and industry demands.

Use the advice in this guide to create a detailed roadmap so you can successfully navigate uncharted territory for your business, whether that’s creating a practice area for cloud services, or developing monthly services like loyalty programs for your retail industry clients.

Here’s what you need to know to get started on enhancing, or creating, a business plan for service portfolio expansion.

Your Plan Needs to be Agile
You’ve thought about the future, studied the trends, and decided that it’s time to forge ahead with new practice areas. Congratulations! Expanding your service portfolio will likely be one of the most important decisions in the history of your business. But your work is only beginning. You’ll need to enhance (or create) your business plan to prepare your company to grow along with the industry. It will take time, but if you start working on it now, you’ll be ahead of the curve.
First Things First: You must have a carefully considered, written, and detailed business plan with specific goals and objectives. When it comes to expanding your service portfolio, there is simply no other way to attempt such an important growth effort at your business. It should be at least a three-year plan, but you can take it to five or ten years for some overarching goals if you want. At the very least, you should plan years one, two, and three in detail.

Think of your business plan as a roadmap. It will serve you in many ways, including:

- Setting out where you’re taking the business and why.
- Reminding you of how far you’ve come and giving you concrete goals to measure against.
- Communicating the end objective to employees so they understand why you’re changing comfortable processes.
- Demonstrating your value and credit-worthiness to the bank if you find yourself in need of a loan during your transition.

Need More Help Creating Your Business Plan? A business plan is both an outline of your plans for the next few years, as well as a resume (of sorts) to help gain financial backing if you need it. Learn what each element of a stellar business plan entails so you can create a truly encompassing roadmap for your upcoming venture.
For this reason, we recommend considering a three-year plan. Your goals for each stage might look something like this if you were adding services with monthly recurring revenue:

- **Year 1**: 25% of deals
- **Year 2**: 40% MRR
- **Year 3**: 70% MRR

Offer New Practice Areas in Stages

Expanding your service portfolio is a big undertaking for your business. It’s not advisable to try and add multiple practice areas at once. Instead, work out a roadmap that allows you to expand your service portfolio in manageable stages. Decide how much of your annual revenue should be coming in from existing services and your new practice area, whether it be monthly recurring revenue (MRR) or not. Then ease that percentage up year over year.

Make a plan that you think is logical and achievable, whether that means adding new services over two years or five. While you need to feel comfortable with your planned stages, it’s also important that your plan is ambitious so that your business does not fall behind competitors in repositioning your value to customers and prospects. Once you’ve reached the end of the first leg of your journey, reexamine your business plan and make reasonable adjustments to ensure your success in the next stage.

Change is difficult and, unless you’re fully invested, those voices in your head might overcome your better judgement and cause you to delay or halt your transition. Don’t give up. Offering recurring revenue-generating services is the key to longevity and profitability. Figure out how to make it work for your company. — Mike Monocello, Editor-in-Chief, Business Solutions Magazine
3 Ways to Add Practice Areas & Generate Recurring Revenue

Now that you know your business plan will involve expanding your service portfolio in stages, here are three proven ways to execute that plan:

1. **Create Service Bundles**
   Instead of offering services a la carte, create bundles that couple existing services with complementary ones from your new practice areas. As you plan each bundle, consider which services will best solve clients’ current problems. Calculate your pricing to determine each bundle’s monthly rate, then get as many new and existing customers to opt in as you can. This starts to build recurring revenue even as you continue to support traditional hardware and software sales, making this approach a win-win.

2. **Prepare Your Business to Sell Service Bundles**
   If you’re not currently offering services that generate recurring revenue, achieving your overall yearly goals with MRR from your new practice areas can be challenging. Train your team to always present your services in bundles. As you roll out new practice areas that introduce more MRR-generating services, you should accept fewer and fewer traditional sales deals.

3. **Gradually Increase Bundle Sales & Close Larger Traditional Sales Deals**
   When you first start offering services for a new practice area, it’s okay to start small. By starting with your smaller customers, you’ll win business without spending a ton of cash. The bigger deals will pay up front, providing you with large injections of revenue for cash flow. Over time, adjust the bar you use to distinguish small from large so that as you can afford it, you close larger and larger bundled deals, while building a strong recurring revenue stream.

*Once you’ve built a steady stream of monthly recurring revenue, you can try out new practice areas with minimal financial risk.*
The Big Question: Should Everything Be As-A-Service?

The answer is, not necessarily. You can take the hybrid model approach and continue to offer break/fix services while simultaneously providing cloud services, managed services, or an array of others. This is another key benefit of developing a transitional business plan that adds to your service portfolio versus transitioning your business as a whole.

Perhaps the most compelling reason to consider this approach for your business is that it allows you to grow your revenue with new practice areas, without forcing you to part ways with clients just because they don’t fit your new service offerings.

Ultimately, which practice areas you want to add, and how soon you offer them, is up to you. Remember, you are making iterative changes to your business over time. Think strategically about the best competitive model for your business in the long term, design a plan that encompasses those goals, then stick to it.
PART 4

MANAGING CASH FLOW
Achieve Business Objectives

To achieve your business objectives, you’ll have to sacrifice some up-front revenue in order to convert it into monthly recurring revenue (MRR). As you introduce new practice areas over time, it’s important to manage your cash flow carefully. The following chapter contains tips to help you improve cash flow—from both an income and expense perspective—as you begin to offer new services. We’ll explore each tip in more detail, but here’s a quick summary:

**Expenses**
- Conserve cash now
- Slash expenses everywhere you can
- Seek better payment terms

**Income**
- Get tougher about receivables
- Choose the right pricing strategy
- Mitigate the risk of nonpayment
- Explore financing options

How much does it really cost to perform one hour of service?

If you need help answering this question, check out our eBook **A Complete Guide to Pricing Your IT Services**. Learn how to calculate your billable labor burden and overhead so you can price your services accurately.
Cash Flow Tips for Cutting Expenses

When business owners think about adding new practice areas, they tend to focus on the revenue side of cash flow, but income isn’t the only thing you should consider when planning to control cash flow. You’ll need to take another look at expenses.

Conserve Cash

The very first stage in your business plan may be to continue business as usual while saving as much cash as possible over a few months. Having extra savings in the war chest can help you finance through tough times as you add more practice areas to your service portfolio.

Slash Expenses Where You Can

Along with conserving cash, you need to reduce expenses everywhere you can, including real estate, taxes, transportation, office supplies, and payroll. If your lease is near renewal, negotiate aggressively and consider moving locations if necessary. Service businesses spend more on labor than any other costs, so you may need to reduce your staff as well. Look for ways to rely on automation instead of human capital.

Jim Stewart, founder of Advanced Data Systems, completely changed his business model, including making the difficult choice to cut his staff by 40%, in order to reduce expenses. He acknowledged, “Whether they know it yet or not, many of my peers are overstaffed to profitably run the as-a-service model. The fact is, with this model you don’t need the same number or type of employees that you do on break-fix.”

1 Mike Monocello, “Meet the Retail POS VAR of the Future,” Business Solutions, June 18, 2013.
In a Blog for Harvard Business Review, Columbia Professor Rita McGrath Made Suggestions for Smart Cost Cutting:

• **Reduce complexity in everyday business processes wherever possible.**
  McGrath noted, “Not only can it save costs, but it often results in far greater customer satisfaction… I’d suggest starting with your payments and invoicing processes.”

• **“Not all customers are good customers.”**
  That’s a particularly relevant point when you’re planning to start offering upgraded service bundles. McGrath suggests that, “Sometimes, the best way to cut costs is to fire the most high-maintenance and expensive customers that cause you to have to take on complexity or service activities that are expensive beyond the value of what the customer can deliver to you.”

**Work With Your Vendors**

Ask vendors for better payment terms to ease potential financial strain. If you have an excellent payment history with them, remind them of it. You can usually negotiate a discount for paying early. You might receive an additional couple of weeks or a month on your terms for better flexibility. Ask now before you are in a cash flow crunch. You won’t get better terms unless you ask, and even if creditors say no, you’re no worse off.
Business credit card interest rates are one of the easiest places to work with vendors on better terms. With so many 0% introductory and low long-term fee cards on the market, you should be able to talk your vendor into better rates. If not, consider switching to another card.

**Cash Flow Tips to Help Improve Income**

When you start adding new practice areas to your service portfolio, the income model undergoes the most dramatic change. Instead of large up-front software and hardware payments, you’ll be collecting smaller, monthly service payments over a longer term. These tips can help you minimize the disruption to your cash flow caused by changing your revenue structure.

**Get Tougher About Receivables**

As you know, slow or non-paying customers can quickly cause cash flow troubles. As you launch into new practice areas, you’ll need a solid process for creating, delivering, and following up on customer invoices. A professional services automation (PSA) solution lets you automate the grueling billing process and set up workflows to invoice clients on a recurring basis.

*Even small changes, like improving the appearance of your invoices, can make a big difference when it comes to optimizing your cash flow. Find out what other billing and invoicing best practices could have a major impact at your business.*
For break/fix customers, send an invoice as soon as work is performed rather than at month-end. Offer incentives for early payments, and consider accepting credit card payments for recurring monthly services agreements. Build the cost of these ideas into your pricing agreements so getting paid doesn’t eat into your profitability.

Create the Right Pricing and Agreements

The most common question that technology professionals ask when they start planning to offer new services is exactly how much to charge. Determining the right pricing strategy is critical to your long-term success. For instance, if you’re asking clients to sign three-year service level agreements (SLAs) and you make a pricing mistake up front, it will haunt your profitability until their contracts are up for renewal!

As You Build Your Pricing Model, Keep These Tips in Mind:

1. Determine the profit you want to earn over the life of the agreement. Be sure to consider all of your expenses in this calculation.

2. Review what competitors are offering. Get feedback from clients about your value proposition.

3. Determine your break-even point for each agreement. How many months of payment will be required before your agreement becomes profitable?

4. Consider offering more than one service bundle with different price levels to meet the budgets and needs of different clients. It’s common for solution providers to create multi-level service offerings.

5. Manage agreement prices over time. Track metrics carefully. Review the profitability of each client individually, as well as your overall business profitability collectively.

Explore Financing Options

If, after careful cash flow management, you’re still short on cash, explore financing options. This is where it will really help that you’ve created a solid, carefully considered, written business plan (for more detail, refer to Part 3). You’ll also want to be able to prove to banks and vendors that you’ve met initial objectives during your early transition stages and made progress toward your ultimate objective.
There are Several Possibilities for Finding Financial Support During Your Transition:

- **Self-Finance**: Reconsider your growth strategy. Would it make more sense to close the largest hardware deals with a traditional sales model and use those large up-front payments to finance smaller service bundle deals?

- **Lease Hardware**: Lower the amount of your total up-front investment in new sales deals by leasing the hardware that you will offer to your as-a-service clients. Many companies offer hardware leasing arrangements for technology professionals.

- **Apply for a Loan**: Explore the possibilities for a line of credit from your bank.

- **Use a Credit Card**: If your cash flow misses are fairly small, you might also be able to get a competitive interest rate on a business credit card.

**Mitigate Risk**

Most technology professionals experience very little customer churn during the initial hardware payback period. No one wants to lose clients, but after you break even, it won’t impact your cash flow. What happens if you lose a customer before the end of their contract?

Minimize the risk of customers keeping hardware they haven’t fully paid for by structuring your agreements carefully. Add a payment-in-full clause into each agreement that requires customers to return the hardware in order to be released from the guarantee to pay.²

For example, if a retailer goes out of business, the company is liable for the cost of the equipment unless it is returned. Once clients return their hardware, you can recycle it to help mitigate any potential loss.

Billing for the Future
The shift to the cloud introduces a unique set of challenges where income and expenses are concerned. Cloud licenses only yield 4-5% profit for technology professionals, which is all but spent in the billing process alone. Small margins aside, client demand for this service is growing. Fortunately, there is a way you can offer these services and still generate MRR.

Transition to a User-Based Billing Model
The days of billing per device are history. User-based billing simplifies the billing process for technology professionals. Instead of sending your client a list of devices, you’ll send them an invoice that ties services to users they’ll recognize. As more of your clients move their systems into the cloud, having this model in place will vastly improve your ability to capture billable time and present it in a way your clients will understand and appreciate.

A Few More Reasons to Adopt User-Based Billing:
- It saves time by streamlining the billing process
- It adds value and stickiness to your clients
- It improves the overall customer experience

Solidify your value by establishing flat-rate payments for your services. When all devices are included, and your clients pay a structured flat rate, you get to establish recurring revenue and they get more comprehensive service that’s less confusing when they get your bill.
Implement Billing Tools & Best Practices
Major cloud vendors like Microsoft have shifted billing responsibilities to technology professionals, so it’s essential that you prepare your business to generate MRR with your cloud services practice area by setting solid processes in place. Using an automated billing tool will enable you to easily and accurately capture revenue, and give you access to a 360° view of your clients’ cloud activity.

A Cloud Billing Tool Should Equip Your Business:
- Generate clean invoices with a streamlined billing process
- Prorate services when users come on mid-cycle
- Purchase cloud licenses from your client’s vendor of choice
- Easily access information within a centralized hub

Even challenging practice areas like cloud services can result in big profit gains for technology professionals. All you have to do is spend the time up front planning for effective billing, invoicing, and cash flow management, and invest in the tools that will help streamline the process even further. Before long, you’ll discover the huge rewards that result from your efforts.

Find out how a comprehensive cloud platform allows you to proactively manage, efficiently monitor, and accurately bill your clients’ cloud licenses, while keeping your cloud service practice area profitable.
PART 5

ADAPTING YOUR SALES STRATEGY
Think Differently

After you adopt the as-a-service model and begin expanding your service portfolio, you and your sales professionals will have to **start thinking differently about the value you’re delivering to customers**. You’ll need to develop a new approach and a new type of conversation with prospective clients. **Get started with these tips for overhauling your sales plan.**

**Rethink Value and Differentiation**

The simple truth is that your clients have become savvier about technology and what it can do to enhance their business. Retailers are comfortable talking about technology, but they need a knowledgeable guide to help them navigate the best tech for their business objectives. Better yet, they are willing to pay not to deal with the headache of figuring it out.

For instance, simply offering hardware or software as-a-service is not a compelling reason for a client to purchase a monthly service bundle from your company. There are hundreds—maybe thousands—of apps and tools in the marketplace, plus numerous competitors in your geographic area.

**Understand the “Why”**

Before you begin selling bundled services and systems, rethink the ‘why.’ Why should clients buy from your company and not others? What are the compelling and unique types of value you bring to the table? *(Hint: It’s not the bells and whistles of your latest technology.)*
If you fail to differentiate your company’s true value, you end up with the same commodities (SaaS and HaaS) that competitors offer. That’s a quick path to a price war.

The reasons clients should want to buy from you will have everything to do with the value of your complete package—the bundle of systems and services you offer, and more importantly, your unique experience, your industry and technology knowledge, and the value of your advice. **Your job is to convince them why you’re worth the investment.**

_Your value proposition can’t just be a monthly payment. Smart, financially sound customers will look at the numbers and know that they’re paying more on the as-a-service model in the long term. Rather, you must identify, create, and employ value-added services and know how to convincingly convey such value-adds to customers so they understand that the monthly payments are not just convenient, they’re beneficial._ — Mike Monocello, Editor-in-Chief, Business Solutions Magazine
Fine Tune Your Sales Presentation

After you’ve got a firm sense of what sets your company apart—your value—it becomes easier to fine tune your sales presentation for the new model. While you can still sell on hardware specifications, you need to focus on the total value of your systems, services, and knowledge and how it can solve problems in your client’s business. This technique is known as solution selling—a highly consultative approach that works best for as-a-service sales.

The best sales professionals have always been good listeners. Selling thoughtfully constructed service bundles that generate monthly recurring revenue (MRR) will take that to a whole new level! As you redefine your business’s role as a trusted technology advisor, train your sales reps to start a conversation, versus giving a presentation, about your comprehensive service offering. Facilitate their ability to discover your customer’s pains and challenges, and then explain how your services are a solution to each problem.

Be sure to have answers ready for these questions from prospects—they come up more frequently than any others during as-a-service sales presentations:

- How long am I paying for this?
- When do I own the hardware?
- Can I just try this for 6 or 12 months?
- When do I own the hardware?
Carry on this conversational style of selling with your existing clients to get them on board with your recurring revenue model. Be prepared for their questions about price increases, service level agreements, and other changes they may notice by creating a frequently asked questions (FAQ) document, or section on your website, that your sales team can share if they encounter objections or skepticism about opting in to your new arrangement.

Overcoming Challenges with Cloud Service Sales

When selling cloud services, you might be met with more than hesitation; you might find that you’re having to battle with a prospect’s fear, uncertainty, and doubt about the necessity or security of the cloud. Don’t back down from this opportunity to showcase your value as a trusted technology advisor. Meet their questions with confidence and information.

There’s always a devil’s advocate or skeptic in the room. If you take some time to genuinely address concerns, you stand a better chance of winning clients over to the cloud.

— Jess Coburn, Founder & CEO, Awesomecloud.com
As you begin to win more deals, you might see the areas of your sales approach that need to evolve. **Leverage tips and examples from vendors and peers** to improve your sales presentation. Some cloud vendors, like Microsoft, will even provide you with sharable information about the cloud. When you talk to other business owners who have made the switch to the as-a-service model, you will come away with some good ideas that you can apply to your sales efforts. You’ll also learn how to avoid some pitfalls!

**CompTIA and ConnectWise** have excellent communities for this type of knowledge exchange. You can also ask for sales and marketing resources, and best practices from your PSA or RMM vendors. They’ve helped thousands of technology companies successfully launch new practice areas. You’re not in this alone!

**Adjust Your Compensation Plan**

Changing your business model will also require developing a new sales compensation plan. Most sales professionals are accustomed to earning commissions at the front end of a deal, but that may be too big of a drag on your cash flow now.

**Here are Some Tips for Designing a Better Compensation Plan for As-A-Service Sales commissions:**

- **Sales professionals need extra carrots.**
  When you’re overhauling your business model and assigning your services to specific bundles, you must design a plan that gives extra incentive for your sales people to close monthly recurring revenue deals instead of falling back on traditional sales. This might involve a higher commission level for specific service bundle sales, or for winning a long-term deal with a new client.
• **Pay a percentage of gross profits, not gross sales.**
  Protect your profit margin and cash flow while still incentivizing your sales reps by paying them a percentage of gross profits instead of basing their commissions on the gross sales.

• **Get creative to optimize commissions and cash flow.**
  You’ll have to find the formula that works best for you and your sales reps. Consider paying a full commission up front on the first year of a long-term agreement, and then providing a residual commission during each of the following years.

• **Highly paid sales people are a win-win.**
  Don’t worry about your sales people becoming highly compensated over time. High commissions mean that your business is growing and meeting sales targets. If your sales professionals are doing well, you’re doing even BETTER!

• **Renewals are not new sales.**
  When a contract automatically renews at the end of the agreed upon term, it should not count as a new sale in terms of compensation. If your sales strategy asks sales people to proactively work out contract renewals ahead of expiration, that should involve some form of extra compensation.

• **Don’t let them rest on their laurels.**
  If sales professionals build up enough residual commissions to live comfortably, they may be tempted to slow down on making new sales. To keep motivation high, define performance levels (quotas) to require new sales in order to meet expectations.

• **Reflect and revise.**
  You may have to adjust the compensation plan as you add new services to your portfolio. And to further ensure long term sales success, compare notes with other technology professionals, and talk to your sales people.
Investing in tools, training, and incentives will not only lead to winning more deals. By equipping sales professionals with what they’ll need to successfully broadcast your business’s major differentiators (your value-added services), you’ll be putting them in a position to grow recurring revenue by building the case for a **long-term partnership between your customers’ businesses and yours.**
PART 6

GETTING CLIENTS ON BOARD WITH NEW SERVICES
Expanding Your Portfolio

Expanding Your Portfolio With New Practice Areas, Like Cloud Services, Won’t Just Impact You and the People You Work With. It’ll Also Mean Big Changes (and Opportunities) for Your Existing Client Base.

Still, people can be resistant to change. That’s especially true when they can’t see the benefit in it for them. So it’s possible that when you start offering value-added services with a recurring monthly fee, you might encounter some hesitancy from your existing clients about getting on board.

In order to overcome any potential resistance, be prepared to clearly communicate the benefits of opting in to a recurring service agreement, like proactive service, minimized downtime, and greater cost-effectiveness for their business.

Once you’ve got customers singing your praises, it’s likely they’ll be more receptive to adding other services from your different practice areas. With the right approach and strategic positioning, you can successfully get current clients on board with new services.
Introduce Existing Clients to Your New Model & Services

Rome wasn’t built in a day, so you shouldn’t expect expanding your service portfolio to be a quick process either. It’s a long-term project, but fortunately, its processes can be broken down into manageable steps. With this approach, you won’t be blindsiding your clients with your new model.

Start with the steps on the next page to make sure you build the strongest case for monthly services, that way you’ll be able to convince even your most skeptical clients of the benefits and value of this model of service.
1. Before you start pitching your new model and services, **develop a goal for the monthly recurring revenue** you want to achieve in the first year, and then build a business plan that will act as a roadmap to keep you on track in the upcoming years.

2. **Recalibrate your sales presentation to position your value-added services as cures to your clients’ pain points.** In short, turn the presentation into a conversation. For instance, ask them what will happen when something in their business fails.

3. Then **spell out the time-consuming process** that leads to resolution: they call you after something goes wrong, you try to pencil them into your schedule, and several frustrating hours or days later, the problem is resolved.

4. After painting that grim picture, **reveal the as-a-service solution**, which includes proactive monitoring and management, so they can avoid downtime all together.

5. To further ensure that your sales team is aligned with your new offering, **revamp your compensation model**. Once these steps have been completed, you’ll be ready to roll out your new model and services to your most skeptical clients.
Ready to Revamp Your Sales Strategy?
Everything you need to know to get started is in Chapter 5 of our *Ultimate Guide to As-A-Service*.

As you work on converting your current clients, be sure that you’re exclusively pitching service bundles to prospective clients. They can’t miss what they’ve never had. In addition, by building your monthly services business organically, you’re creating opportunities to build customer success stories around your new model, thereby creating a positive impression of your service model that people will talk about, which could result in valuable referrals.

**Start with the Most Willing Clients**
Approach your existing client base strategically. Don’t start off by asking your most stubborn client, who took 3 years to onboard, to be your first user. Measure time spent on service delivery and segment by service type, and be very selective about who gets access to it first.

**Start with the clients you know are forward thinkers, or always looking for new ways to grow.**
Dealing with Stubborn Legacy Customers

Listen, we know sometimes you have to take on tough clients to keep the lights on. We get it. But be mindful of the amount of time you’re spending on these customers. Track time spent on high maintenance clients, and then measure it against the revenue they’re generating within your business to determine whether they’re profitable partnerships or not.

On top of that, think about whether or not these clients are the right culture fit for your business. While culture might seem like a fleeting corporate buzzword, it’s important to recognize that it’s real, it’s lasting, and whether you attentively cultivate it (as you should) or not, it will impact your business. That includes both your colleagues and your clients.

So Before You Let a Toxic Client Poison Your Company Culture, Ask These Questions:

1. Is Your Company Vision Clearly Communicated to Your Clients?

In addition to your clients, this should also be top-of-mind for your staff. Broadcasting a clear message will keep clients from developing unrealistic expectations about your partnership going forward with the new plan.
Do They Share Your Thought Process for the Direction of Your Company? If you’re a forward-thinking business (and you are, if you’re adding new practice areas to keep up with industry demands), look for forward-thinking clients who will support your endeavors to offer proactive services.

Are You Willing to Fire Them if they Don’t Align with Your Vision, Culture, and Process? This is the difficult part, but it’s a necessary step if you want to maintain your company culture and keep things running at peak performance.

While it may strike fear into your heart at the thought of it, now is the time to seriously consider firing legacy customers who won’t get on board with your new model or services. Treat them the way you’d treat your employees in the same scenario: allow them a set number of changes to correct behavior before you cut them loose. We know it’s not easy, but wouldn’t you rather invest your time in customers who are headed to the same place you are?

Evaluate Your Client Base

With a professional services automation tool, you can pull reports to see which customers are profitable and which ones may actually be costing you money. You should also evaluate how much time is allocated among each of your clients. If you notice that one of your less than profitable legacy clients is taking up 15% of your techs’ billable time, it may be time to let them go.
PART 7

CREATING A TARGETED MARKETING CAMPAIGN
Most technology professionals rely on word-of-mouth referrals to get new business through the door. Then, managed services expand technology professionals territories from local to regional. Maybe things didn’t change much then, but now with the cloud expanding the possibilities to include international clientele, it’s more important than ever to start marketing your business to attract new clients.

We get it. Running a business keeps you busy as is, and even more so as you start adding new practice areas to your service offering. It might seem easier to let your legacy clients spread the word about your business for you. But why only rely on word-of-mouth referrals when you could be tapping into a global marketplace? Effectively marketing your business doesn’t have to be complicated, expensive, or time consuming.

This guide will show you how to overcome the time and cost challenges that might be holding you back from proactively growing your profit and adding to your recurring revenue stream.
Part 7  Creating a Targeted Marketing Campaign  Continued

Narrow Your Focus
It’s a busy digital world we live in. In an email statistics report, The Radicati Group, Inc. estimated that worldwide email users total around 2.6 billion, with sent and received emails stacking up at more than 205 billion daily. It seems like taking the time to create an email campaign to attract prospects wouldn’t be worth it if it’s going to be buried under that avalanche…but there’s good news.

Would it shock you to know that successful marketing is more about exclusion than inclusion? Gleanster research indicates that only 25% of leads generated by marketing campaigns are at the point where they’re ready to have a conversation with sales. So instead of casting a wide net into the prospect pool and hoping you catch the attention of your ideal buyer amidst billions of distractions, **focus your marketing efforts on that 25% portion of your specific market.**

If you’re feeling hesitant about marketing without having a dedicated professional (or portion of your budget), don’t worry. There are a variety of easy, inexpensive, and effective ways to reach your target market (like email marketing, social media, and blogging) that will help you spread the word about how awesome your business is. But first, you need to understand your target market.

Start By:

- **Doing Market Research**
  Investigate industry trends, find out what your competitors are (and aren’t) doing, put your findings together, and figure out what your prospects are looking for from your business. This will provide valuable insight into what practice areas are in demand and what aspects of service are most desired.
• **Developing Buyer Personas**
  This is a semi-fictional depiction of your ideal buyer that’s derived from market research and information from your existing customer base. Think of it like a social media profile. It’ll have information about their values, their role, and their business, but takes it into the professional realm by also including what problems they may be trying to solve (that your services would be a solution for). Spending time developing this tool will ensure that your advertisements speak your ideal buyer’s language in a relatable and recognizable way.

• **Creating Targeted Messaging**
  Are you speaking your ideal buyer’s language? We’re constantly being barraged with messaging in various forms. The way to make yours stand out is to use the information from your market research and buyer persona to tell a story that will resonate with your target market. Infuse your emails, social media updates, ads, and website with phrasing that focuses on how you can solve their unique problems. And remember, a powerful message doesn’t have to be complicated. Keep it simple and clear, avoid technical jargon, and you’ll be sure to catch the eye of qualified prospects.

Creating a targeted marketing strategy can seem counterintuitive because it promotes exclusivity. However, savvy marketers know that doing more work up front to eliminate wasting time on unqualified leads later is the best way to drive new business.
Where to Start: Outbound vs. Inbound Marketing

There are a lot of ways to get a buzz going about your business, but they typically fall into one of two categories: outbound or inbound marketing. Outbound marketing includes tradeshows and conferences, seminar series, cold calling, advertising, and email blasts to purchased lists. The goal is to send your message out into the world, hoping it finds your qualified prospects. Inbound marketing takes the opposite approach. The idea is to help your prospects find you by harnessing the power of search engine optimization (SEO) with blogging, social media, and your website.

Inbound marketing is a great place to start for new technology businesses, or technology professionals that are new to marketing, because it’s effective and cost-efficient. According to research from Hubspot, inbound marketing costs 62% less per lead than outbound (or traditional) marketing.

Build Your Online Presence

Start building your online presence with your website. Leverage keywords to improve your visibility to search engines (like Google), and choose a design that promotes an inviting, user-friendly experience. Avoid too much text, illogical product pairings, and regularly maintain it to keep up with trends. Don’t overlook social media! This could be the secret weapon in your inbound marketing arsenal, if you know how to use it.

If your website is the digital front door to your business, is it inviting new business in or turning it away? Find out how your website measures up to make sure it’s working for you, not against you.
What to Do with Your Marketing Data

Creating expertly crafted messaging to grab your ideal buyer’s attention is just the beginning. As new leads find your business, you need to determine their readiness for sales. Organize your leads into these telling categories: marketing qualified leads (MQLs), sales qualified leads (SQLs), and sales qualified opportunities (SQOs).

Decode the alphabet soup to learn what your marketing data is really spelling out. Check out these tips for gaining more insight out of your leads’ scores.

Your campaign metrics will help provide you with vital perspective into how your prospects are engaging with your marketing. Over time, you’ll be able to recognize patterns, and from there you can assess the structure, content, and success rate of your campaigns based on the number of new clients you’ve gained from them.
No Dedicated Marketing Professional? No Problem.

Email marketing is an easy and effective way to start spreading your message to prospects, and many email marketing platforms will provide you with analytics attached to each campaign. Learn how to leverage the information you’ll get after every campaign.

Attracting more qualified leads isn’t difficult, it just requires a little more time in the beginning to pay off big in the end. And however you choose to start marketing your services, it’s important to set specific goals before you launch your campaigns. For example, aim to get a certain number of new contacts, sales calls, or subscriptions to your eNewsletter. Track how many people open your emails, and how many click through to your website from there. Afterwards, you can calculate your marketing analytics to get a big-picture understanding of its success, and what you can do to improve your results next time.

Want to add more minutes to your day? Marketing automation is the answer. Equip your tech solutions business with a powerful tool that offers robust reporting features and aligns with your business management platform.
PART 8

HOW TO RETAIN CLIENTS
Client Partnerships

Clients are savvier than ever when it comes to technology and their businesses, so it's not enough anymore for technology professionals to offer the most in-demand services, and leave it at that. **If you really want to retain clients, a partnership has to be created that establishes you as their trusted technology advisor and an integral part of their business.**

The advice in this chapter will provide you with the steps you’ll need to take to create a lasting relationship with your clients, so that you can help their businesses thrive while establishing a steady source of recurring revenue for yourself.

Create Service Delivery Standards

Every interaction with a customer, whether it’s in person or remotely via automation tools, affects customer service levels. So it’s important to create standards for those interactions so your customers always know what to expect from you.

**Start by building a knowledge base.** This is a list of standard solutions to common problems. With this, any tech servicing any customer can quickly find and implement the best way to solve any of the documented solutions.

Taking the time to educate customers on your service delivery standards and processes will set reasonable expectations from the start. If customers know what to expect, they’re less likely to have lofty expectations you’ll have to dispel later.

**Always Under Promise and Over Deliver.**

You can always step it up a notch later, but you can’t blot out a missed deadline. To keep your team on the same page, build out standard service level agreements (SLAs) and have your team communicate these to customers. Take it a step further and create goals for relevant team members to **ensure these customer expectations are consistently achieved.**
Implement a Record-Keeping Process

Over the life of a contract, your client could have interactions with several members of your team, which could result in your client having a different experience every time. There is one element of consistently exceptional service that is often overlooked: detailed documentation.

Having a unified process for documenting client conversations, issues, and configurations can be the difference between decent and exceptional customer service. Imagine your client calling about a recurring issue, and within the first minute of the conversation your employee says, “I see you’ve had issues with this in the past. Let’s see if we can try something different.” You’ve now made your customer feel like the technician knows their situation, even if it’s the first time this particular employee has spoken to them.

Having a centralized repository for client records, like the business management platform in the ConnectWise suite of solutions, makes it easy for any employee to become an expert on your client in a few minutes.

Stay in Front of Your Clients

While automation tools are great for being efficient, they can get you into a bad habit of going long periods without touching base with your clients. Remember, this is still a service business and client retention is highly dependent on human interaction.
Looking for Clever Ways to Keep in Touch with Clients?

**Consider these simple, effective options:**

1. **Service Anniversary**
   Demonstrate how detail oriented and customer focused you are by thanking your clients for their business in the form of a phone call, email, postcard, etc., on the anniversary of their contract.

2. **Birthday**
   Unless your customer doesn’t celebrate birthdays, for religious or other reasons, celebratory greetings on the special day are typically welcomed. Add this detail into their customer profile in your business management platform. It’s a very simple gesture, but it can go a long way toward creating a solid partnership with your clients when you show them that they’re more to you than just a contract.

3. **Upcoming Renewals**
   If you’re tracking service renewal dates, send a friendly reminder of upcoming expirations, and the need to renew if your client doesn’t want to experience a gap in coverage. If you aren’t already doing this, you’re literally letting your strongest recurring revenue opportunities slip through your fingers.

4. **Helpful Tips**
   Share the wealth of knowledge you’re apprised of as a technology professionals in recurring eNewsletters, email signatures, blog articles, prerecorded messages, or other media. It will position you as the expert, and educate them on emerging opportunities and threats.

5. **Complaint Follow-Up**
   This is a great way to see where you stand with your customers, and give them a proactive opportunity to complain to you before they complain to your other customers. Follow up a week after a problem is solved to ensure there are no residual issues. Your customers will thank you with their loyalty.
You Can’t Assume That Not Hearing From Them Means Everything is Okay.

Keep in mind that many people, when satisfied, feel no need to contact the company, while others will quietly grumble about flaws in service or products and swear off a company without ever seeking help or voicing their complaints so that the situation can be remedied.

There’s another problem technology professionals commonly run into if they go long enough without communicating: customers might start to question if they really need your services. They don’t realize what goes into making their systems run smoothly day-in and day-out, so when everything is working and they haven’t heard from you in a while, they might start wondering what value they’re getting out of their monthly payments. Unfortunately, this problem only rears its ugly head when they decide not to renew their contract.

The Importance of Quarterly Business Reviews

These problems can be avoided by proactively staying in front of your customers on a regular basis and proving that you care about their business. Stay front and center with quarterly business reviews where you discuss reporting, and show the number of issues you’ve fixed for them over the previous quarter. If your customer is on a managed services contract, add up all the issues that have been resolved, multiply by your hourly rate, and demonstrate how much money their contract saves them.

Whether it’s quarterly, semi-annually, or annually, it doesn’t matter. Don’t skip this step, as it can solidify a contract renewal long before it’s time to resign.
Send Customer Satisfaction Surveys
From your client’s perspective, a big part of your job is to resolve issues when they arise—and fast! Dissatisfaction with the resolution to their problem can play a large role in their overall opinion of your services. Consider building customer satisfaction surveys into your service delivery process, and ask them to fill out a quick survey after an issue has been resolved.

You can set up an automated workflow in ConnectWise Manage® that sends satisfaction surveys upon ticket closure. This not only gives customers opportunities to voice concerns but also allows you to gauge and document issues with clients that you can discuss in quarterly reviews.

Leverage Automation Tools

Proactively Monitor for Issues
Designed to keep work flowing, a business management platform (BMP) and remote monitoring and management (RMM) tool can automatically raise flags when issues surface. For example, if the RMM can’t deploy a prewritten script to resolve the problem(s), it will create a ticket in the BMP that provides basic details and notifies your dispatcher that resources need to be assigned. By automatically pushing all issues to your dispatch team, you greatly reduce the opportunity for serious issues to slip through the cracks.
Set Alerts for Contract Renewals
As you grow your portfolio of service contracts, it can be hard to remember exactly when each contract is up for renewal. Documenting client configurations in the client’s record can help you stay on top of new sales opportunities.

In ConnectWise Manage, you can set up workflow rules to alert you when a contract, warranty, or license is about to expire, making it easy to pick up the phone and ask for the additional business.

If you’ve built a solid relationship where you’ve repeatedly demonstrated your value to your clients’ businesses, they will be impressed with your proactive nature, and you can feel confident that you’ll secure their business for years to come.

Leveraging your automation tools and the steps in this guide will help you deliver timely, proactive services that will add value and stickiness to your business. Remember that no gesture is too small when it comes to showing your clients how invested you are in their success.
PART 9

MAXIMIZING CUSTOMER JOURNEY EFFICIENCY
Maximizing Effectiveness Throughout the Customer Journey

Think of your business process as a journey. From marketing to billing, and all of the steps in between, you’re leading your clients down a path that reinforces your value to their business at every turn. If done successfully, you’ll have the foundation for a legacy relationship with your client, and you’ll be able to add to your recurring revenue stream for years to come.

Consider this your field guide for navigating the customer journey with the right tools.

The Customer Journey
There are many variations of the customer journey out there because they’re meant to be tailored for each business and industry. Essentially, a customer journey is a framework that outlines your relationship with your clients through a series of touchpoints. As their guide, your mission is to exceed (or at least meet) their expectations throughout each of the touchpoints, starting with the very first interaction they have with your company.
The following 6-step journey is perfect for technology professionals wanting to provide their prospects and clients with a more effective experience from start to finish.

1. **Marketing**
   - Your prospects not only expect to know what services you offer but more importantly what value those services will bring to their businesses. Therefore, in this first touchpoint, your goal is to create and broadcast targeted messaging to attract your ideal buyer to your business.

   How do you accomplish this when you’re short on time and a budget? Use a marketing automation tool. These solutions are designed to help you easily build and deploy emails and landing pages, score new leads for sales readiness, and understand your marketing metrics so you can accurately measure the success of your efforts. The most effective marketing automation tools will integrate with your professional services automation (PSA) tool to keep your information centralized, so you can avoid bogging down the sales cycle.

   **Take unnecessary delays out of the sales cycle and focus on building your business with ConnectWise Campaign.**

   Remember that this phase isn't exclusive to your prospects. **Make sure you market to your existing clients to keep them in the loop as you open new practice areas and add new offers into your monthly service bundles.**
Sales

When you’ve determined which of your prospects have become qualified sales leads, it’s time to prime them for purchasing. To meet their expectations in this phase, it’s crucial that you follow up with them in a timely manner, and provide them with a proposal that is easy to understand.

The tool for this job is a quote and proposal automation solution, or configure, price, quote (CPQ) tool. Its purpose is to bring visibility and accountability into your sales process so you can confidently turn your leads into happy new clients. Think of this tool as a second brain for your sales team!

Gear up for the sales process with ConnectWise Sell®. Eliminate sales cycle hassles and replace them with awesome, crystal clear quotes and proposals.

Choosing a quote and proposal automation tool that doesn’t work seamlessly with your PSA and marketing automation tool won’t do you any good (working with disparate systems never does). Whether you’ve got a sales team, or you’re playing the roles of business owner, marketing manager, sales rep, and tech, choose a solution that helps keep your information in one place, so you can maintain peak performance at all times.

Purchase

In the purchase phase, meeting new client expectations is all about delivering on your initial promises with speed and accuracy. After the price is determined and the agreements are signed, it’s time to fill their order–pronto!

Business management platforms, like ConnectWise Manage®, offer a 360° view into the sales process and use automation to eliminate the potential for human error, like ordering the wrong products or charging the wrong price.
Rely on your PSA and CPQ tools to work in unison delivering your new client information to the right place, once the deal is solidified. Congratulations! You’ve successfully brought a brand new client on board. **Now the real work begins.**

### Implementation

Your clients have bought your services, and now they expect to start seeing the benefits of their purchase. In this phase, it’s key to deliver consistent, proactive services, and if you really want to wow them, give them full visibility into the implementation plan.

**ConnectWise Automate®** lets you tap into the benefits of streamlining your service delivery process with business automation.

Using a PSA and an RMM tool that work in unison is the most effective way to navigate this phase in the journey. By automating redundant tasks, and working to prevent major downtime for your clients, you’re fulfilling expectations and solidifying your value as their trusted advisor.

### Support

Support is the phase that makes or breaks the legacy client foundation you’ve cultivated thus far in the journey. Navigating it successfully will require the use of your PSA to help your team access, track, and manage issue resolution service tickets.

**Capture every detail of a problem resolution conversation with ConnectWise Chat®. This tool integrates with the ConnectWise BPM to ensure nothing falls through the cracks.**

No one likes feeling stranded. So when an issue arises that’s causing downtime for a client, you may need to be able to access their machines at a distance. A remote control solution that works with your other business automation tools is the best way to execute instantaneous service that will elevate you to hero status in your clients’ eyes.
Billing

You’ve reached this customer journey’s final phase! In this last touchpoint, your business management platform should help you calculate your charges and deliver invoices that mirror what you quoted in the second phase of the journey.

There’s no such thing as being too consistent in this final touchpoint! Predictability is a good thing, so send out your bills at the same time every month and closely track payments.

*If you want a seamless handoff between each phase of the customer journey, you need tools that are up for the task. You need the [ConnectWise suite of technology solutions](#).*
ConnectWise is a Software Company that Connects Technology Teams to the Solutions, Services, and People that Allow Them to Thrive.

Our business automation platform stands at the center of a comprehensive Ecosystem of integrated solutions, best practices, and a community dedicated to everyone’s success. We are driven by our passion to make it simple for technology professionals and CIOs to build resilient businesses, delivering the platform, Ecosystem, community, and resources that drive consistently amazing experiences.

For more information, visit ConnectWise.com or call 800.671.6898.

It’s all upside, and it’s all within your reach.
About ConnectWise

ConnectWise transforms how Technology Teams successfully build, manage, and grow their businesses. Our award-winning set of software solutions provide a seamless experience to companies in more than 70 countries, giving them the ability to increase their productivity, efficiency, and profitability. When combined with our passion, commitment to innovation, and more than 35 years of experience, ConnectWise software solutions deliver the results companies want at each step of their business journey. Attend one of our events and see the benefits of our game-changing community firsthand.

For more information, visit ConnectWise.com.