

ALIGNING TECHNOLOGY FOR BUSINESS GROWTH



# *The Managed IT Services Handbook*

*Your guide to business IT Support*

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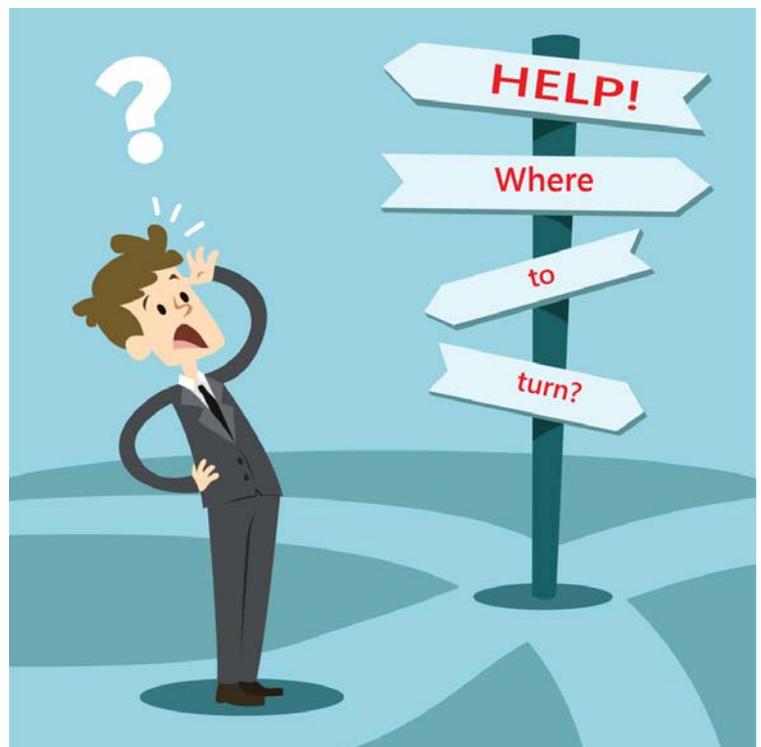
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# Technology.

It's a word that conjures up any number of specific things. Some people think of the iPhone they're currently holding or the laptop in their bag, while others see programming code or bits and bytes. Still others envision their smart TVs, wireless cameras, or smart light bulbs. And for some office mates, it is the printer that's currently jammed...again.

Technology is varied and dynamic, as are the people who support it. And as the technology used in businesses becomes more pervasive and complex, you need the right expert to install, maintain, and service it. Just as you wouldn't hire your mechanic to repair your washing machine, you also shouldn't expect your website developer to install your laptop onto the company network. However, as technology becomes more intertwined, it's not always easy to know who is the expert in which field.

Amid the frustration of a laptop blue screen or your email not working properly, your only thought is to find someone who can fix it. But not knowing who to reach out to can compound your problems.



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# An Introduction to IT

## IT Support - Defined

The terms IT Support or IT Services are thrown about casually without much thought as to what they mean. The first portion of the term, "IT", stands for information technology, which basically translates to any computer-based information systems. This can include your business' servers, switches and routers, firewalls, computers, laptops, tablets, smartphones, e-mail systems, network storage devices, WiFi, cloud systems, etc.

The second part of the term, "Support", refers to the person or persons who install, configure, maintain, and fix your IT systems. They have many different job titles, but some of the most common are: desktop support specialist, help desk specialist, help desk technician, IT support specialist, IT technician, network engineer, network administrator, support technician, systems administrator, systems engineer.

## IT Support Functions

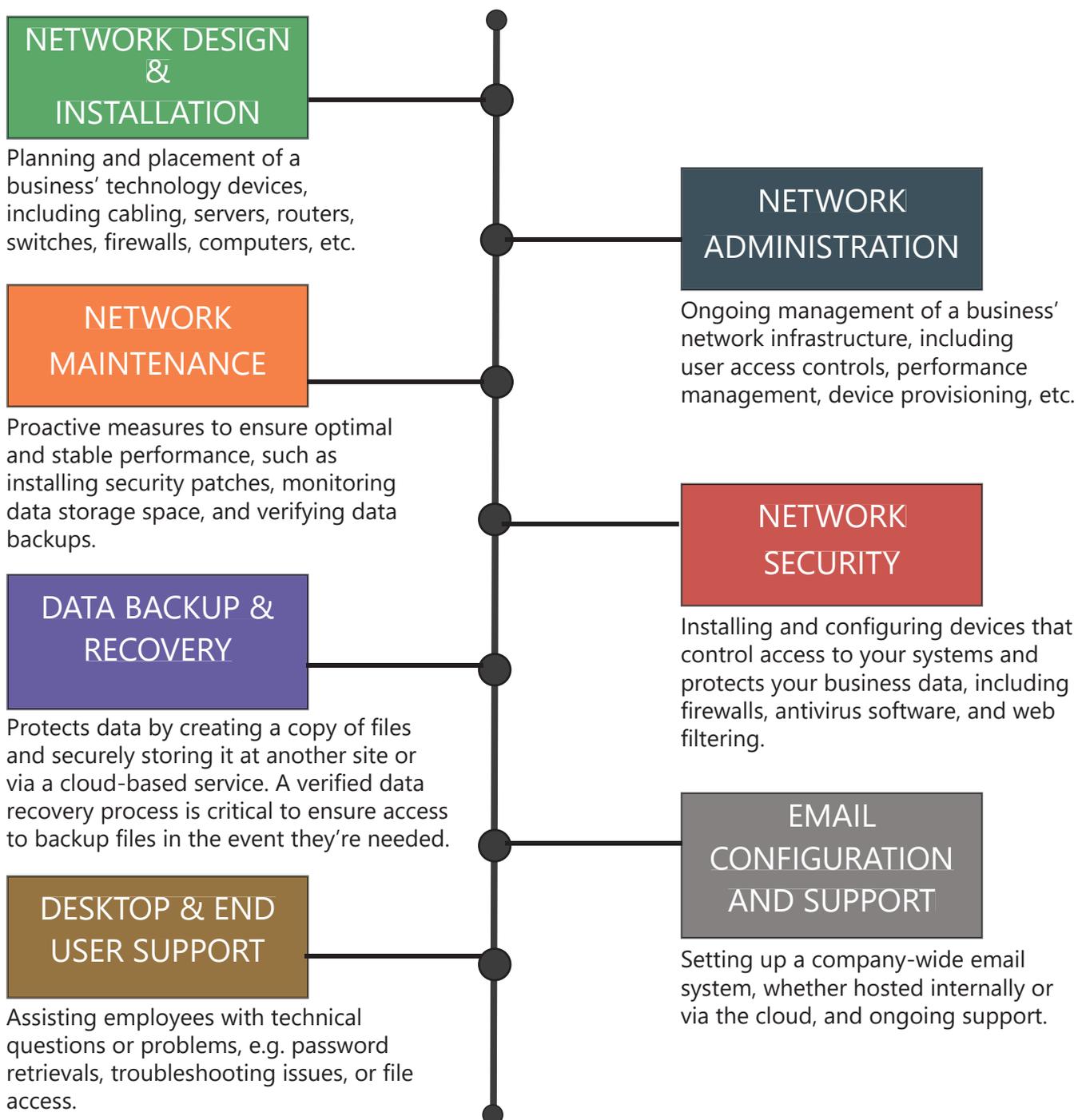
Whether you have 2 or 2,000 employees, a business' IT support needs often require more than just simply fixing something once it breaks. Some common technology challenges that are universal across most businesses are:

- Purchasing the right equipment
- Setting up a communication network
- Installing computer and networking devices
- Integrating core business applications
- Setting up company-wide email
- Troubleshooting technical problems for employees
- Backing up data and ensuring its recovery

- Securing data and adhering to applicable industry regulations, e.g. Payment Card Industry Data Security Standard (PCI DSS), Gramm-Leach-Bliley Act (GLBA), Sarbanes-Oxley Act (SOX), or Health Insurance Portability and Accountability Act (HIPAA)

Regardless of size, virtually all businesses face these challenges at some level. A comprehensive IT support model addresses these needs, and often more.

## Basic IT Support Functions



## 2

# Types of Business IT Support

Businesses large and small increasingly rely on technology to manage most aspects of daily work. Having a basic understanding of what IT Support encompasses and how it is delivered can help you align your needs with the type of support your business requires. Knowing who to call when you need help is a critical first step.

## Support Delivery

The manner in which IT support for small to mid-sized businesses (SMBs) is undertaken is understandably different from a personal, individual user. Whereas you might take your daughter's broken laptop to a local repair store, business IT support is often carried out onsite or remotely.



Onsite IT support refers to a scenario in which an engineer performs service and support at your business location, or "onsite". This occurs when it is necessary for the engineer to have physical contact with the devices. Common support functions that usually occur onsite are PC or server installations, firewall installations, wireless network setup, and email migrations.

On the other hand, remote IT support allows the technician to service your systems from another location. Using remote support software, the technician securely connects to your computer or system from their own consoles via the Internet. They can then run diagnostics and troubleshoot any issues. Common support functions that often occur remotely include end user support, upgrades or patch support, or antivirus configuration and updates. Most businesses will use a combination of onsite and remote IT support services.



# Support Models

There are three main IT support models that businesses can adopt:

1. Internal IT
2. Outsourced: time and materials (T&M)
3. Outsourced: managed IT services

They each have their own pros and cons, and it's important to understand what each entails to make sure it's right for your business and needs.

## Internal IT Support



Internal IT support means that you have an internal technical employee(s) on staff responsible for all technology support, installation, maintenance, and so forth. Large, or enterprise, businesses often choose to have an entire internal IT department to handle their network infrastructure, end user support, technical projects, and IT planning. They value the intimate, in-depth, and specialized knowledge an internal team solely dedicated to their network can provide.

For SMB organizations, the expense of having an internal team is typically not possible. However, some do choose to have one or a few IT employees. They value the benefit of having someone onsite with personal knowledge of their business to handle IT issues immediately. However, an IT support staff salary is expensive. And, with only one or two resources, ensuring coverage during vacations and time off can be problematic. For most small to mid-sized businesses (SMBs), relying solely on internal IT support is neither desirable nor possible.

## Outsourced: T&M (or Break/Fix)

The philosophy behind a break/fix IT support model is when it breaks, fix it. This outsourced approach consists of you hiring an outside IT specialist or even an IT support company. When a problem occurs, you report it to your service provider. They will either come onsite or work remotely to address the problem. Once resolved, you are billed for the time the technician took to resolve your issue.



The main benefit of break/fix support is that it's a pay-as-you-go model. Some small companies value the convenience of no ongoing costs and believe that it is more economical.

The chief drawback to break/fix is inherent in its very philosophy, when it breaks, fix it. And if it breaks again, fix it again. And again. And again. You never know when something will break, and what impact that will have financially. This leads to an unstable environment and unpredictable costs. In the long run, break/fix will often cost your business more.

## Outsourced: Managed Services



The philosophy behind a managed services support model is to prevent things from breaking in the first place. This outsourced process consists of hiring a managed services provider (MSP) who proactively monitors and maintains your technology infrastructure to stop problems before they start and minimize technical disruptions. Many issues can be identified and corrected proactively without any impact to your business. When a problem does arise, the provider receives a notification in the instant at which it occurs and can address it either remotely or onsite. You pay a monthly flat fee for the

service regardless of the number or severity of issues. This is the type of service that we offer here at Daystar.

# ADVANTAGES of working with an MSP

A managed services model aligns the interests of the service provider and your business. Both parties want network stability because they both lose money when anything goes wrong. While you experience lost productivity when problems occur, MSPs lose their biggest resources – technical support time. Therefore, MSPs work proactively to ensure that your network is stable, secure, and high performing.

Although there is an ongoing cost, the enhanced stability and security of your network results in less downtime and more productivity for you and your team. What's more, it takes technology off your plate. You no longer worry about IT and can focus instead on running your business.

Choosing the right IT support for your business depends on a variety of factors. Size, industry, resources, the sophistication of your technology needs, and your business goals all influence the decision. SMBs are increasingly turning to managed services. The outsourced model allows them to leverage expert technical support and employ systems they might not have access to on their own. And the proactive approach helps stop problems before they start. Which model is right for your business?

- > Predictable costs and consistent budgeting with a fixed monthly fee
- > Unlimited service hours
- > Proactive maintenance and monitoring
- > Security and data backup tools
- > High quality network management systems
- > Faster response time with defined service level expectations
- > A technical team of resources dedicated to keeping you up and running

# 3

# Most Common IT Issues and How to Fix Them

Most businesses depend on information technology in their daily operations. When working properly, technology can propel business growth and success. But sometimes things go wrong. When that happens, technology quickly becomes a disturbance or even an outright barrier to success.

In our work with various small to mid-sized businesses (SMBs), Daystar has identified some common IT challenges businesses encounter in order to provide guidance on how to tackle them.



## Frustrated Employees

Your team relies on technology to do their jobs. If that technology isn't up to the task, it can cause serious problems. Slow systems or outdated devices make it harder to get work done and directly impacts employee productivity. In addition, the increased frustration negatively affects morale.

The best way to prevent this challenge is to recognize its importance. Equip your team with appropriate tools and software to help them accomplish their tasks. Be sure to proactively maintain your systems and ensure software updates and security patches are made. Just like your car needs periodic oil changes and service to run better, your technology systems require regular maintenance to operate at peak performance. And when your systems are operating on all cylinders, they empower your team to do the same.



## Underlying Causes

In the throes of a technology issue, you have one goal: fix it! However, issues are sometimes a manifestation of a bigger problem. If you don't take the time to dig deeper, you are addressing a symptom and not the real cause. This usually leads to the same issue recurring over and over again.

Don't settle for simply knowing what went wrong and how, or when it will be fixed. You should focus on why the issue happened in the first place. Understanding and solving the root cause makes the problem go away for good and eliminates repeated calls for technical help.



## Integration

Technology changes all the time, but not at the same pace. Newer tools may not play nice with older systems or legacy applications. Operational and employee efficiency can take a huge hit as integration issues force duplication of tasks and the inability to quickly find and track data.

Before implementing something new into your environment, it is important to plan appropriately, and not just for the nuts and bolts of how to set it up. Thoroughly map out what other systems it will interact with and identify any compatibility issues.



## Collaboration

Businesses are creating more and more data all the time. And the employees who use that data aren't necessarily in the same location – they could be in a different office, working from home, or on the road. Couple the increased data with a more mobile workforce, and a business is challenged with how to efficiently and securely share data. Sharing files and making sure you're working on the current version can be problematic.

Use file sharing software to enable secure access to data regardless of where employees are located. This helps eliminate the need to email files back and forth and reduces confusion around which version of a file is the most recent.



## Security Risks

SMBs are major targets for cyberattacks. They have valuable data but don't necessarily have the same resources to protect their systems that larger companies have. As hackers become more sophisticated in their use of social engineering to target your employees, it becomes a question of when, not if, you will be targeted.

There is no magic shield that guarantees your business is safe. Your goal is to minimize the risk of being attacked. Don't make yourself an attractive target; don't be the low hanging fruit. Set security controls at both the network and user level. Implement and enforce policies around data access, storage, and destruction and increase security awareness among your employees with training. By using a layered approach to security that addresses the technical, business, and human variables, you'll make it harder to target your business and reduce your risk of a breach.



## Data Recovery

Businesses increasingly understand how important it is to back up critical business data. However, many do not take the recovery process into account. When your server crashes, the power goes out, you accidentally delete a file, or experience any other type of data loss, the process to recover your data varies depending on the configuration of your backup. While you might expect a few hours of downtime, it might actually take several days to transfer and restore data.

Data recovery depends on various factors: the amount of data stored, how often it is backed up, and the method in which it is stored. Define the maximum amount of downtime and loss acceptable to align your backup process with your recovery expectations. In techie terms, downtime is your recovery time objective (RTO) and loss is your recovery point objective (RPO). An IT support provider can help you set these variables, identify other mitigating factors, and determine the right configuration for your data recovery needs.



### **Tunnel Vision**

Amid our daily routines, it is not uncommon for people to hyper-focus on their specific objectives. The same is true for business operations and IT. All too often, operations and IT staff become disconnected. And, without an understanding of the operation's strategic goals, IT doesn't necessarily have the systems in place to support it.

Keep the business and technical sides connected, and make sure everyone is working toward the same goals. For example, if you plan to open a second location within the next six months, your technical staff should be making plans now for new equipment and connectivity needs. Likewise, if your IT department is planning a company-wide email migration during early April and you're an accounting firm, your operations team may have valid concerns over their CPAs' downtime. With proper business technology alignment, you will minimize problems and facilitate smoother operations.



## **Budgeting**

Technology isn't cheap. If you're not prepared when something goes wrong, the impact both in terms of hard and soft costs (e.g. employee productivity) can be steep.

It's important to look ahead and plan for upcoming technology expenditures such as new devices, software, etc. Also, plan for your IT support costs. If you outsource to a managed IT services provider, this would be a predictable monthly cost. In addition, make sure you include some wiggle room for the unexpected. Do this for both one and three-year terms so you know what to expect.

Technology is a critical tool in your business operations. By understanding some of the common pitfalls facing businesses, you can take proactive measures to protect your operations, empower your team, and realize your goals.

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# Starting out with Managed IT Services

Now, not all technical problems or pitfalls can be addressed by a quick fix. Technology is complicated, and the systems needed to run your business can often require more time and expertise than someone on your team can provide. When you reach this point, it's time to sign onto managed IT services, and prepare for the transition.

What steps can you take to make the shift as seamless as possible? How do you prepare your team for the change? Read on for some guiding principles that will set your team up for success with your new IT provider.

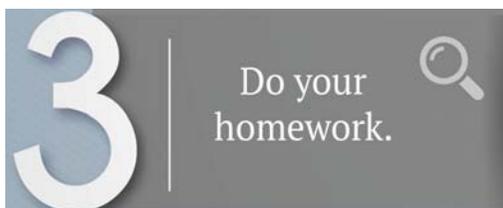
## 3 Steps to Transition Success!



While the ultimate goal as a managed services provider is to drastically reduce your team's administrative IT overhead, there is one exception to the rule: the onboard process. Onboarding refers to the procedures and tasks undertaken to transfer your IT support to a new provider. There is a vast amount of information that needs to change hands, especially in today's age, when IT is the bedrock upon which most successful businesses have been built for decades. The more information you can provide, and the more engaged you are in the transition, the better your IT service provider will understand your teams, your workflow, and your network.



During the onboard, tools will be installed, your infrastructure will be documented, and your workflows mapped. It's a big undertaking, and if there is something you don't understand, or simply don't know, ask! There are very likely skeletons in your IT closet, and it is best to point them out. Keeping them buried only makes for ghosts in the machine. This is a judgement free zone – however self-conscious you might be about your staff's technical aptitude, or your production server that hasn't been updated since the Y2K scare, the days of IT providers making their clients feel small or foolish are over. Information is key here, and if you don't know or don't understand something, ask. Likewise, if you don't understand a line of questioning or why Toolset A is being installed on Server B, ask. The more you understand about the systems being put in place, the smoother the transition and subsequent support will be.



At this point, while it might be tempting to kick back, pour yourself a well-earned beverage of choice, and watch the sun set on the days of unmitigated IT disasters, there's one final step to ensuring a positive transition: take the time to fully understand your new support resources. Let's break this down into a few categories:

### > **Services**

Familiarize yourself with the components of your managed services package. It's important to know the amount of support time you have, how much cloud storage you have, and what type of malware protection you have. Having a good understanding of the services your new provider is contracted to provide means you know exactly what you can depend on moving forward.

## > **Expectations**

While you're making your way through the fine print of your newly inked contract, take a moment to review your service level agreements (SLAs) with key personnel, so support response expectations are properly set. Response times and ticket priorities might be changing significantly from your in-house or previously outsourced IT, so it's important to make sure your staff's expectations are properly aligned to prevent a rocky first few weeks.

## > **Human Resources**

Acquaint yourself with your new resources and their roles. Have a question about implementing a new piece of software or the risk in giving a vendor remote access to network resources? Shoot your network admin an email. Understanding who your advocates are on the IT side, and their new role in working with your organization, goes a long way.

## > **Methods of Contact**

Workflow changes always accompany a change in IT providers, so making sure everyone knows how to use the new ticketing system, when to pick up the phone and call in an issue, and which email address you can use to automatically generate a ticket are important steps in ensuring that staff actually receive the support they need.

Was that your sigh of relief we heard as you realize that none these recommendations for a smooth transition into managed services are technical in nature? Far from it, in fact – they hinge on communication, understanding, and due diligence. Making sure you're actively engaged in the process of changing providers, and taking the time to make sure your team understands the new resources at their disposal is enough to grease the wheels and get the new relationship humming along nicely.

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# When to Upgrade Your IT Provider?

Maybe you have worked with the same IT provider for some time. Perhaps, you handle IT yourself or task one of your employees with the responsibility. If you're wondering whether your current support is right for your business, continue reading to see if you've outgrown your current arrangement.

Often, there is no one reason a business decides it's time to change IT providers, but rather a variety of contributing factors. It's not always clear if the time is right. However, there are some general indicators that may help. The process of making a change may seem intimidating, but as long as it's done right the benefits will make it worthwhile.

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Size is one of the easiest triggers to identify. When the size of your business grows, your IT support needs can change. You begin to feel that you have outgrown your IT support. This normally manifests in one of three ways: numbers, dependency, and sophistication.

Adding employees or locations increases the number of devices and amount of equipment that must be supported and managed. For a single internal IT resource or a small break/fix provider, the difference in supporting 5 versus 15 employees is vast. When your numbers grow to the point that your current provider can't keep up, it is time to consider upgrading to a more proactive managed IT services model.

When your size increases, your dependency on technology also grows. Consistent, reliable support is required. A single IT person who has other clients, takes periodic vacations, or even gets sick once in a while cannot provide the availability you need. Whether it's a help desk or a small support team, you now require multiple resources to ensure access to support when you need it.

# FRUSTRATION

As you grow, your technology needs often get more sophisticated. File sharing, email configurations, access rights, connectivity, and security become more complex. If your current IT provider does not have the knowledge and resources to expertly guide your business, it is time to find support that can.

Whereas size is the easiest trigger to identify, frustration is the most common one. If you, or your team, are regularly dissatisfied with your IT support, consider that a big red flag. Frustration usually stems from two main areas: support and account management.

Common support issues include:

- unresponsive service
- recurring problems
- finger pointing or blaming
- careless security processes
- a lack of listening or desire to understand

Frustrations with account management usually center around sales and billing. Excessive up-selling, unexpected charges, and a lack of transparency are some of the issues we hear about most often.

It's important to understand that this frustration is more than simply aggravating; it also negatively impacts your business' productivity and bottom line. Over time, the soft costs of lost productivity can be staggering. This is one area you want to address quickly should it occur.

# Business Priorities

Just as the economy changes, so too can your business' priorities. When you set new goals and strategic direction, it is a good time to review your IT service to make sure you have the right support to achieve your goals.

Although this is sometimes related to changes in a business' size (as described above), it can also occur independently of actual increases in an organization's headcount. For example, established businesses capitalizing on market changes and transitioning to a strong growth mindset begin to rely more heavily on technology. These fast-paced environments may require a level of service beyond what the business previously needed.

Increased security needs is another business priority that can signal the need for more sophisticated IT support. Implementing secure data access controls, antivirus solutions, and data backup configurations can quickly become complex as you work to minimize the security risks within your network environment. As ransomware and other cyberattacks have increased, security and risk management has become a more strategic business priority for many small and mid-sized businesses. This is especially true in specific industries governed by data security regulations, such as healthcare and financial services.

New workforce initiatives can also impact the type of support you require. For example, as more organizations shift to allow employees flexible work schedules, teleworking, and the ability to use their own personal devices for work (BYOD), their technology needs change to support that. Providing IT support to a remote workforce using a variety of computers, laptops, tablets, and smartphones may demand a higher level of technology expertise than you currently have available to you.

Whatever your reason for changing IT providers is, use it as a chance to get off cruise control. Technology can be confusing and intimidating; once a support plan is in place, many businesses leave it alone. Unless something goes drastically wrong, they adopt a "set it and forget it" approach.

But your business does not stand still, and neither should your technology. Technology shouldn't just support your business; it should optimize it and enable you to reach your goals. Periodic reviews, performed at least annually, will help either confirm your plan or identify when it's time to make changes in your IT support.

You can learn more about our approach to managed services, [Daystar Direct](#).

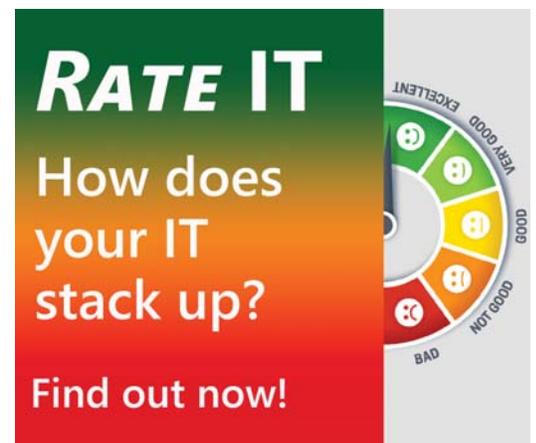
# For more info...



## Technology - demystified.

If we cleared up some of the tech-speak around information technology, and increased your understanding of the different IT support models, common issues businesses face, and tips to help you successfully transition to a managed services environment, then we invite you to learn more about [Daystar](#) and take advantage of the information in our business technology [blog](#).

And don't forget to check out our RateIT tool. Rank your business' current IT on a 10-point scale for your customized IT Score!



For more information about Daystar, contact us today!



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