Automation - Pop the cork on getting a few things automated

We get one particular question asked a lot in support and on calls with partners. "What are the other partners automating?". Our answer still applies now as we encourage partners to look towards automation. The answer is we see most partners automating things based on the problems they are trying to solve. Given the number of variables and differences between partners, the problems don't ever seem to be the same. There are also two sets of problems to solve, customer problems and MSP problems. Both are solvable though we often recommend starting with problems that are directly related to the MSP and will benefit the customer. Break the problem apart as well. We often see MSP partners trying to go from a zero (nothing in Scripted Actions) to a ten (a perfect script that solves the whole problem). The idea is to go from a zero to a number greater than zero and call that version one. Over time and multiple versions getting to a nine or ten will be the outcome.

Example 1- Healthcare customer—ePHI is often a liability that an MSP has tom mange, a script to identify unencrypted Office files in shares that contain strings similar to a SSN and report those with an output file. This automation that reduces liability and will provide value to the provider.

Example 2 - Any customer - on premise to cloud migrations can be arduous with many tasks. Those tasks that provide the highest degree of consumption (time or resources) will benefit from the development of automation to perform those tasks while removing human error. i.e. PowerShell app that prompts for old to new paths and builds a robocopy string.

Playbook - Plan for that party and the guests

If there is one thing we can say we see here at Nerdio…"there are a lot of different MSP partners in all shapes and sizes". In our experience the MSP that stands out is the one with a playbook. We love to hear "we are moving to Azure and are going to use this customer to add and update our current playbook"...it brings a tear to my eye when I hear that. Between culture, leadership, methods and host of different operators, a playbook can be the culmination to tiring all of that together. It provides a clear statement of here is what we do, here is how we do it, and here is why we do it. It takes an MSP from the reality of who they are to the image of what they want to be. Details and alignment are key in any organization. With a playbook a new layer of accountability gets added which will eventually become culture. Much like the automation above, the goal is not to go from a zero to a ten, but to go from where you really are and start by raising the level by two or three. To get started find one item where alignment is a challenge. Putting clarity around that item will go a long way to support re-alignment and often times you will find out about other issues that have been hiding under the surface.

Some examples directly borrowed from the Nerdio playbook.

- The tenants of a good ticket
- Response times and SLAs

- Messaging on how to coach partners
- Ticket workflows and automations

- Processes for GoLive Engineering
- Internal training and resources

Proactive - don't leave fireworks out at a party

When it comes to MSP practices and support, there will always be two routes for every issue, project and customer engagement, either pro-active or reactive. Pro-active will of course always be preferred route, but reactive is sometimes inevitable. The goal for any MSP should be to mitigate the requirement of reactive actions by implementing as many pro-active measures as possible. Pro-active measures will allow your team and resources to be "freed up" for when a reactive measure is needed. For example, if a server needs a restart due to something critical for a user, but is in the middle of running updates, this lack of pro-active measures has now caused a reactive action to be put on hold. Your customer and team are now in a bad spot. Your proactive and even reactive measures are not completely isolated and they do work hand in hand with each other. This is something every MSP should keep in mind. Some great proactive practices to help the reactive side are:

Detailed changelogs - **Routine maintenance and updates** - RMM tools to monitor environments - **Standard and thorough planning and testing procedures for your team** - Planning strategies around recurring reactive situations to take proactive measures

Reactive situations can spawn proactive measures for the future. Ways to help can be:

   - **Details on what needed a reaction (detailed ticket notes, changes made, customer specifics, etc.)**

   - **Setting a cadence of team reviews of reactive situations and post-mortem analysis**

   - **Recording of metrics to look for recurrence and trends (happens X amount of times over N period of time)**

   - **Team communication, everyone that could be involved should be involved and aware**

Proactivity in the MSP world is not just automatically updating Windows, it is organizing, planning and executing based on what your team visions for the future and what they've learned from in the past.

Can vs Should - You can invite 200 people, but should you?

While this topic may resonate and feels familiar from our youth, it is a worthy reminder to keep integrity and deliver to customers at the levels they deserve and expect. Limitations within any MSP are never considered a reflection of potential. It just means there is an understanding of the lanes and the vehicles by which you are going to travel down those lanes. While your one tier 3 employee can hot wire multiple Azure regions with advanced routing and peering, the level of expertise in your front line support staff should dictate you shouldn't. After all, less is more and simple is better when it comes to when it comes to already complex environments.

Over engineering or transplanting one environment to a new environment is something we witness more than we should. Change, especially for a customer, can be a good thing. Whether through repairing the mistakes of the past or finally urging and convincing the customer its time to abandon that old application, simplifying and minimizing complexities will provide its much needed advantages. Unfortunately, more often than not, those complexities are the result of months or years of avoidance. As with most complex things, the avoidance compounds and rewards all of the benefactors with what we term here at Nerdio as a "most excellent adventure" (borrowed from Bill and Ted of course).

Believe it or not, your customers value your leadership. When they hear you say "yes we can do that...but should we?" becomes the moment where simplicity and a little investment will pay the dividends everyone is looking for.

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On behalf of everyone here at Nerdio, we wish you all the best and much success in the coming new year!

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"We will open the book. Its pages are blank. We are going to put words on them ourselves. The book is called Opportunity and its first chapter is New Year's Day."
— Edith Lovejoy Pierce

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