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Five Ways Great MSPs Automate Their Businesses

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Automate for Growth and Efficiency

When we talk to managed services providers (MSPs) of almost any size or maturity, the question of automation often comes up. MSPs want to run their companies efficiently, and automation can free up time spent on repetitive tasks—so they can focus on growing their businesses.

Additionally, many focus on the growth automation can enable. Increasing efficiency can potentially help free up capital to invest in other areas of the business. Streamlining manual tasks allows technicians to work on higher revenue activities while still being paid for the maintenance work you've automated.

On the other end of the spectrum, some MSPs are already growing quickly and need to streamline how they onboard customers. Eliminating manual activities during the onboarding process allows these MSPs to onboard customers faster and provide them with a better experience.

Each provider's exact needs vary, but we've discovered five actions successful MSPs take to automate business.

1. IF A TASK IS REPETITIVE, THEY AUTOMATE IT

Maintenance can consume a significant amount of technicians' time. MSPs should focus on automating as many day-to-day maintenance tasks as possible. As a general rule, if you perform a repetitive task that uses a similar set of steps on a recurring basis, you should automate it.

Automate the basics: One of the first (and likely easiest) things you should automate is preventive maintenance, such as desktop cleanup (delete temporary files, flush DNS, etc.) Many MSPs still manually complete these simple tasks, which can take their technicians away from important service calls or higher value projects.

Automate the specifics: Some of your customers have specific needs. For example, if your customer has numerous SQL databases, you could automate database table maintenance and cleanup for them to keep their servers running at peak performance. There are hundreds of items you can automate, and it is important to provide your customer with the most value possible via your automated services. By providing high value services via automation, you root your services deep within your customers' businesses. This can make it harder for competitors to walk in off the street and undercut you.

2. THEY AUTOMATE REMEDIATION FOR COMMON PROBLEMS

Service level agreements (SLAs) play a major role in the relationships between customers and MSPs. Your customers need their infrastructure available at all times, and your goal is to minimize downtime. Many issues simply require a software or hardware reboot—simple tasks that pull technicians away from more urgent issues requiring their expertise.

Use self-healing in your RMM: Your RMM software should provide self-healing capabilities. If a device or service changes to a warning or error state, the system should automatically launch an automated process to remedy the situation. Common automation policies involve restarting key services, flushing DNS, and in some cases, rebooting the workstation or server.

Exceed your SLAs: When you automate remediation, you provide an almost instantaneous response to a customer problem. These quick resolutions can build good will with your customer. Customers don't like downtime, and if your services fix problems before customers even realize they exist, you provide immense value. Just make sure to use reports to show your customers the number of issues you resolved and the hours or days of downtime your services helped them avoid.

3. THEY STREAMLINE CUSTOMER ONBOARDING

Automation is as much about best practices as it is about technology. Once you discover the maintenance and remediation tasks you want to automate, you can better package your service offerings. This allows you to be more confident in your maintenance schedules and response times when you pitch customers (and have a better sense of the margins you could earn).

Deploy probes automatically: To streamline customer onboarding, you need a system in place to discover devices and deploy probes automatically. This will greatly reduce the time it takes to add devices to your management software.

Schedule automated maintenance: Once you set up your monitoring, you need to schedule your automation policies to take care of routine maintenance. This way, in the early days of the onboarding process, you spend less time performing maintenance and can be available for any support issues.

Schedule remediation: By automating remediation for common issues, you can impress your customers with how quickly you meet your SLAs when you need to fix something, winning you points with the customer in those crucial early days.

4. THEY WOW THEIR CUSTOMERS

Customers spend their valuable dollars with you. Providing meaningful updates about the work you do can go a long way toward winning their loyalty. As the saying goes, out of sight, out of mind. Status reports can help you give weekly updates on maintenance and other issues.

You should also dive deeper via a quarterly review with your customers to remind them of the value of your services. Your RMM system should provide graphical reports for customers and allow you to schedule delivery of those reports. Graphical reports can have a bigger impact with customers than a written summary.

» Executive reports provide an overall status of the network, including a comparison to the previous week's performance.

» Security reports show customers how protected they are and the number of issues you prevent.

» Backup reports can help re-assure customers their data remains secure in the face of a potential data loss incident.

» Patch reports demonstrate you're keeping customer systems fully up-to-date.

» Help desk reports can help customers justify the costs they are spending with their service.

5. THEY GET PAID FOR AUTOMATION WORK

Just because the system does the work for you doesn't mean you shouldn't be paid. Every MSP has the choice of performing tasks manually or investing in tools to automate their business. By automating maintenance and remediation tasks, you can improve your response time and provide your customers with better service. You still offer the same value—maybe even more.

Automate ticketing: Your automation policies should be able to update your ticketing system so that, when they complete, you log time for the task. For example, you might assign 15 minutes for small tasks and more time for larger tasks. Before you know it, the system will execute policies almost all the time, and rack up a nice invoice of billable hours for you.

Leverage "discounts" to boost customer satisfaction: A common strategy to build good will with customers is to discount some of the "automation hours" the system has logged. Your costs associated with these hours can be next to nothing, and giving your customers a small percentage discount could easily go far in strengthening your customer relationships.
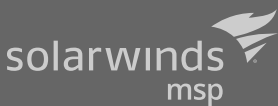
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