

LEVEL

PLATFORMS

Managed Workplace® v6.0

Driving Net New Recurring Revenue



Executive Summary

Managed Workplace® unlocks opportunities to drive net new recurring revenue services based on remote monitoring and management. These new, pro-active service opportunities drive net-new service revenue with existing and new customers, and also generate new ways of rapidly identifying new incremental project opportunities for existing customers while lowering the cost of service delivery and operational expenses for solution providers.

This new services revenue is incremental and can be achieved while continuing to delivering break-fix services. In fact, many solution providers use Managed Workplace as a seamless way of transitioning their revenue base to a more predictable and higher-margin recurring revenue stream.

The initial service that delivers net new recurring revenue is easy for service providers to implement and the least disruptive to existing business practices. Thus, delivering the most immediate ROI and establishes the framework for added benefits as your business expands.

The most successful partners are those that sell value-based services founded on traditional end user value, such as network performance, security, uptime and faster response and resolution times. Using Managed Workplace, “selling managed services” becomes a value-added increment to your existing sales pitch so that you can continue to sell on the same traditional value points.

The implementation practices outlined in this paper is the elementary foundation of a solution provider transition to a managed services practice.

This White Paper document describes:

- How to get started and build a successful value-based recurring services model based on Best-In-Class business practices.
- How to leverage Managed Workplace to successfully create new revenue opportunities based on comprehensive reporting capabilities, pro-active maintenance, asset management, security assurance and 24x7 continuous monitoring.

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1.0 Aligning with Customer Demand

Market research reveals that small to midsize business (SMB) owners want to see solution providers as more than just a service provider, but also as a trusted advisor¹. Information technology can be confusing and expensive so small business owners need to have someone they can trust and rely on to guide them. Any solution provider that obtains this status creates a strong competitive advantage.

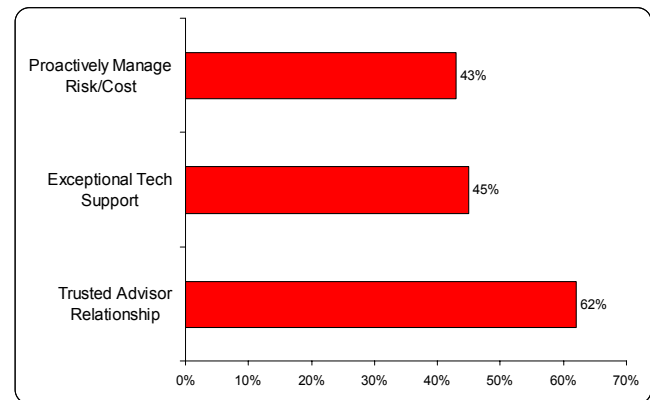
According to current market research, the top three attributes that would help customers evaluate and choose among competitive solution provider companies are:

1. Trusted Advisor,
2. Quality of Technical Support, and
3. Ability to Proactively Manage Risk.

Figure 1: Top 3 Competitive Differentiators

Institute for Partner Education and Development 2006 study indicates that certifications, low price point, and vendor reputation ranked very low on the differentiation list.

Source: *Institute for Partner Education & Development, 2006*



Managed Workplace enables you to deepen your value proposition along each of these 3 key value drivers:

- As a “trusted advisor” the opportunity to do more than simply replace on-site break-fix revenue with remote services based revenue. You need to provide new value-added services not available in a break-fix model such as asset management, continuous monitoring, rapid remediation, proactive maintenance and comprehensive security.
- Managed Workplace enables new services without the need to make any radical changes to the current delivery of other services. For example, the asset collection and monitoring capabilities of Managed Workplace enables the opportunity to review on a quarterly basis exactly what assets the SMB has and how effectively they are being used. Managed Workplace’s reporting enables you to have that quarterly conversation with each and every SMB customer – demonstrating that you are worthy of being a “trusted advisor” by delivering true added-value to your customers.

¹ “... SMBs value superior service and support far above any other attribute when evaluating technology and IT providers; they would rather engage in new services with IT and solution providers they already trust than seek out a brand-new provider.” Channel Advisor, Tiffani Bova, Gartner research director, *Home- in on Managed Services Opportunities*, Fall 2007, pg 41.

- Most SMB customers would define “exceptional technical support” based on their service provider’s speed and responsiveness in fixing problems. In other words, your mean time to repair (MTTR) a problem is a key performance indicator in the customer’s perception of exceptional technical support.

By leveraging Managed Workplace, a service provider is able to improve in MTTR capability.

IT risk and its potential impact on any organization can be especially devastating to small and midsize companies given their limited resource availability and tight cash flow. Fortunately most of this risk can be anticipated and proactively managed with sound utilization of IT resources coupled with appropriate third-party applications.

Managed Workplace enables service providers to proactively manage IT risk at 3 levels:

1. Provides comprehensive, detailed and accurate inventory of all IT assets so that your customers can be properly insured and protected against physical loss from fire and theft.
2. Provides choice in the automated tools used to identify security and data recovery vulnerabilities, as well as proactively reporting the status of backups, Anti-virus, Anti-spam, and security configuration to ensure that IT assets are properly protected against logical loss of data.
3. Enables you to remotely monitor your network 24/7 and to obtain deep insight into resource utilization as well as be alerted to abnormal conditions.

The automation capabilities of Managed Workplace enable you to replace what would otherwise be unachievable as an expensive, labor-intensive process with a low-cost, effective and comprehensive service offering. By leveraging Managed Workplace’s extensive interoperability with best-in-class security products, you can even create a customized risk management offer without being constrained in your selection of the most appropriate tools for anti-virus, anti-spam, security scanning or backup and recovery.

2.0 Quantifying Your Incremental Opportunity

Opportunity Calculator (based on a new recurring service priced at \$149.00 per month)

Partner Gross Revenue per month $\$149 / \text{per month} \times 100 \text{ customers} = \$14,900$ monthly recurring new revenue

Partner Gross Revenue per year $\$149 / \text{per month} \times 100 \text{ customers} \times 12 \text{ months} = \$178,800$ yearly recurring new revenue

As illustrated above, charging a fee of \$149.00 for a monthly service for 100 customers will generate new recurring annual revenue of \$178,800. Managed Workplace can readily convert the efficiencies gained from remote monitoring and management into an increased capacity to win and service more customers. Incremental service revenue can also be driven from existing customers.

This recurring revenue stream is created by using Managed Workplace to offer an incremental basic services offering on top of your existing service offers.

Note that this does not include the additional value that can also be created by using Managed Workplace to generate new project sales, or to offer more advanced recurring services such as website monitoring and proactive patch management. In fact, many solution providers are able to double and triple their monthly gross revenue beyond \$149 per month from such incremental services – without increasing their cost base.

3.0 Driving New Recurring Service Revenue

Since Managed Workplace provides a comprehensive foundation for driving added value, the challenge facing solution providers is really how best to effectively package and position these incremental capabilities with their client base, determining the right approach, contract terms, price-point and service expectations.

This section provides an overview of how best to organize to deliver these services in the most profitable manner. A companion document, *Managed Workplace 6.0 Best Practices Guide*, provides a step-by-step “cookbook” for implementing these services. This method of deployment provides solution providers with the easiest way for implementation and highest install ROI.

3.1 Packaging Your Initial Service Offer

The way to obtain a high rate of interest from your customers is to offer continuous monitoring, reports and regular quarterly business reviews to your entire customer base and new customers. This is easily positioned as an accelerator for your existing break-fix services and can be sold to customers on the basis of reducing MTTR through increased security, maximized uptime, reports and quarterly business reviews. Many customers are willing to pay for peace of mind obtained from having their premises continuously protected by their service provider using Managed Workplace. Selling this service at the \$149 price point suggested earlier unlocks a predictable revenue stream that will enhance your trusted advisor status as you deliver the new service.

The key to capturing this revenue is to offer a compelling new valuable service based on very traditional end user value your organization has been successful with in the past.

- Increased Security
- Improved Network Performance
- Maximized Uptime
- Monthly Reports
- Scheduled Quarterly Business Reviews (QBR)

Continuous monitoring, monthly reports and regular quarterly business reviews provides you with a tremendous wealth of information that when analyzed and reported to the customer provide significant opportunities to sell additional products and services that will improve the performance of your customer’s IT and drive out costs.

To help you provide a range of information Managed Workplace provides two types of reports: predefined standard reports that can be used as part of this standard service offering, and configurable selector-based reports that can be used to provide the necessary information to support recommendations for additional services.

For example, the Work Completed Summary Report is a predefined report that shows the volume of tickets closed each month, while the Site Alerts Report is a configurable report that will show you the Alerts summarized by categories (selected by you) for the site as well as the top problematic devices that generated most of those alerts.

To get started, we recommend that your initial proposal should include the following services:

- Continuous Monitoring
- Asset Management

- Security Assurance
- Preventative Maintenance
- Quarterly Business Review, with the supporting reports for each of the above

3.2 Continuous Monitoring

With Continuous Monitoring you provide a real-time service that is substantially differentiated from traditional break-fix, time and material services. Managed Workplace will automatically and continuously monitor the network presence of all the assets discovered in your network audit.

3.2.1 Availability

With continuous monitoring you have access to dashboards that show the availability of these assets on each customer's network, as well as a summary across all your customers. Managed Workplace also tracks the up-time and down-time of these assets so you know how long a system has been available or offline.

You can view the availability of devices for a site at any time via the Device Dashboard and you can report on the availability of devices in several reports including the Executive Summary Report and the Windows Server Health Report.

Managed Workplace also enables you to test Internet availability from your customer's site as well as monitor the availability of websites used by your customers (such as their own website, hosted e-commerce site, Salesforce.com, etc.). The Site Network Statistics Report shows Internet availability and the Site Website Availability Report shows how reliable a website is, allowing you to diagnose the source of slow response times across a range of potential sources from the hosted application to local network or device problems.

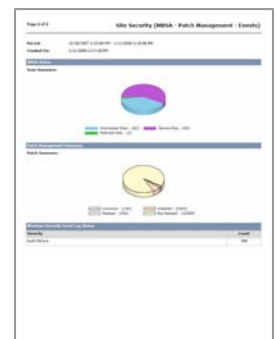
By monitoring website availability as part of your standard service offering, you will be aware of potential unavailability issues, such as up-time and response time and propose potential customer upgrades based on data-driven analysis.

3.3 Initial Assessment

These reports are intended to show your customer how much work needs to be done and why they need you to do it. While some partners find that they need to offer the initial assessment as a "loss leader" to generate initial sales of managed services, most partners are able to get paid for the initial assessment by using these example reports of what they will find.

The screenshot shows a 'Site Hardware Summary' report. It features a table with columns for 'Asset Name', 'Manufacturer', 'Model', 'Serial Number', 'IP Address', and 'Status'. The table lists various pieces of hardware such as servers, switches, and routers. Below the table, there are sections for 'Summary Statistics' and 'Asset Details'.

Site Hardware Summary Report: This report provides a hardware summary for the site. It is an easy way for you to show the diversity of the equipment that you will be managing and will help you identify any hardware that may be obsolete.



Site Security Report: This report summarizes the security patches automatically applied to all systems on this site by Managed Workplace, as well as a summary of all the MBSA

scans performed during the reporting period. When run on a new site, this report will generally show a significant amount of work required to improve site security.



Site Performance Report: This report summarizes the most heavily stressed devices at a site. Using the report selector in Managed Workplace, you can report on the Top 10 devices by CPU Utilization, and by Memory Consumption. This report highlights devices that will likely need upgrades and can be used to establish the basis for subsequent up-sell opportunities.

3.4 Asset Management

Asset management is the cornerstone of your recurring services because it provides you with the information required to deliver all other services in addition to delivering valuable asset-based insights to your customers.

While it is possible to offer an Asset Management service without Managed Workplace, the high manual cost of performing comprehensive asset management is prohibitive without an automated solution. Consequently, you will be immediately differentiated from traditional solution providers who will not be able to afford to match the price point of your automation-based service. By bundling this service with other more advanced services, you ensure that your total service offer can't be beat on a value-for-money basis.

Using the capabilities of Managed Workplace, service providers can:

- Perform detailed network audits to discover all IT assets
- Compile comprehensive hardware asset inventory
- Identify sub-standard hardware configurations
- Track warranty expiry dates and
- Assemble detailed inventory of the software, Windows patch history, and services on each computer

3.4.1 IT Network Audit

Managed Workplace will continuously and automatically audit your customer's network, discovering new assets in real time as well as showing the availability of previously discovered assets. You can configure how frequently this audit will run as well as the network addresses to be included or excluded during the audit.

This network audit includes anything with an IP address: desktops, laptops, servers, network devices (such as managed switches, routers, firewalls, gateways, VoIP switches), and network-attached devices such as printers, fax / scanners, VoIP phones and specialized equipment (dental, medical devices) environmental control devices (uninterruptible power supplies, temperature sensors).

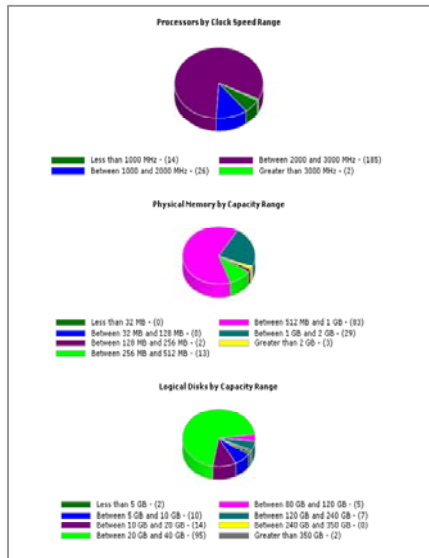
Managed Workplace provides a Device Dashboard in your Service Center that allows you to see all the devices discovered at your customer sites. It also retains a memory of previously discovered devices to facilitate device re-discovery (for devices which are frequently powered off that might be missed in any given audit).

Within half an hour of being installed at a large site, Managed Workplace will have conducted several comprehensive network sweeps to ensure that all network accessible devices are discovered. For many customers, this information alone reveals an accurate count of most of the IT assets at a site.

3.4.2 Hardware Asset Inventory

As assets are discovered, you can identify and configure them as required to enable Managed Workplace to automatically gather detailed configuration information from them. Managed Workplace provides predefined reports that enable you to present a detailed hardware asset inventory at both a site summary and per-device level:

- Site Hardware Summary that shows a count of each type of hardware component at a site. For example, the number of Windows 2003 servers, XP desktops, monitors, disk drives of various capacities, video cards, etc. This report is ideal for summarizing the diversity of equipment at a site.



- Device Hardware reports that shows the detailed hardware configuration of a specific device. By running this report for each computer at a site, you can deliver information that will significantly facilitate the insurance information needs of your customers.

Page 2 of 2 **Device Hardware Summary**

Device Name: /MARCINK-RT-0006F **Operating System:** Microsoft Windows XP Professional
Manufacturer: Hewlett-Packard **OS Version:** 5.1.2600
Model: HP Compaq net110 (P20653AA#ABA) **Service Pack:** 2.0
Period: 1/20/2008 6:10:00 PM - 1/24/2008 6:10:00 PM **IP Address(es):** 10.0.0.132;
Created On: 1/24/2008 6:17:10 AM

Hardware Assets				
CPU	Version	Model	Clock Speed	
Intel(R) Pentium(R) M processor 1.73GHz	Model 13, Stepping 9		1730MHz	
Logical Disk				
C:	Capacity	Used	Free	
	38155MB	18473MB	19682MB	
CD Drive				
D:	Manufacturer	(Standard CD-ROM drives)		
Physical Memory				
503MB				
Video Card				
Name	Color Bits	Resolution	Driver	RAM
nvidia nv40 (01:13D0\0918\13D0M, Express Chipset Family	32	1024 x 768	6.14.10.4308	128MB
nvidia nv40 (01:13D0\0918\13D0M, Express Chipset Family	0		6.14.10.4308	128MB
Sound Card				
D:	Manufacturer	Analog Devices, Inc.		
SoundMAX Integrated Digital Audio				
Network Card				
Broadcom 440x 10/100 Integrated Controller	DHCP Enabled	MAC Address	Driver	Driver Version
Intel(R) PRO/1000 Network Connection	True	00:14:C2:09:AF:D4	Broadcom 440x 10/100 Integrated Controller	4.25.0.0
Intel(R) PRO/1000 Network Connection	True	00:15:09:08:37:41	Intel(R) PRO/1000 Network Connection	9.5.2.25
Monitor				
Plug and Play Monitor				

3.4.3 New or Disappearing Assets

Since Managed Workplace is continuously scanning your customers' network every couple of minutes (this is configurable), you also have a continuous view of new devices appearing in real-time.

This continuous view is presented via the Device Dashboard for every site that you manage. Using this dashboard, you can drill into the devices already under management to see their asset details, currently assigned IP address, DNS and hostname, performance counters and other attributes. You can also see the currently assigned IP address for new devices and you still have access to the device asset info for devices that were previously under management and are now offline.

3.4.4 Sub-Standard Configurations

You can use the Site Hardware Summary Report internally to quickly identify components that may need upgrades. For customer purposes, you should use the configurable selector for the Site Asset Baseline Report to identify configurations that will require upgrades since it allows you to report on all assets that meet a specific upgrade criteria.

You can use this report to identify hardware upgrades required for new versions of software. For example, using the Site Asset Baseline Report with different selections, you can use it to detect all computers having less than 1 GB of RAM (required for Vista or SBS 2003 R2). Similarly, using the Device Asset Inventory Report you can review the hardware specs for a device to ensure that it meets the minimum configuration requirements you are considering.

By including a review of sub-standard configurations in your quarterly business reviews with your customers, you can set in motion the planning and budgeting that your customers need to do to enable you to obtain additional non-recurring revenue from upgrade opportunities.

3.4.5 Inventory & Warranty Expiry Tracking

Managed Workplace provides several custom fields that can be used to identify and track user-entered asset information such as asset inventory numbers and warranty expiry dates.

By simply assigning your own asset inventory numbers across all desktop, server, and network assets and showing these fields on your asset tracking reports, your asset management service will look comprehensive and professional to your customers. This differentiates you from your competition and promotes your status as Trusted Advisor.

The Device Attributes Report can also be used to show all devices whose warranty period has expired. This provides valuable feedback to your customers to assure that they do not pay twice for hardware maintenance while positioning you to offer maintenance plans as soon as the warranty periods expire. Performance statistics on devices under warranty combined with the knowledge of approaching end of warranty provides the opportunity to maintain and replace failing components at a minimal cost and further prove your value and Trusted Advisor

3.4.6 Software Assets

Managed Workplace provides a Site Software Inventory Report so that you can report on:

- Inventory of all installed applications on each desktop or server (i.e. same as Add/Remove Programs control panel display in Windows),

- List of all the hot-fixes applied to each system, and
- Summary of the operating system inventory.

By reviewing this information with your customer, you can spot rogue software that is either not licensed, is obsolete or is disallowed in your customer's environment. For example, "I didn't know we still had that", or "I don't know why that app would be on that system", type comments from customers can be used to rationalize the use of existing licenses as well as to free up resources for legitimate purposes.

In addition to providing your customers with information about their systems these software asset reports position you to offer additional services such as reconciling licences paid versus copies installed, and detecting old or obsolete versions of software that you can offer to upgrade for an incremental fee.

3.5 Security Assurance

Security assurance tremendously improves your value proposition when targeting new clients. Using Managed Workplace, you can improve the security of your customer environments and prevent the introduction of new security risks. For example, all of Managed Workplace's features are outbound so that you never have to open ports in customer firewalls to enable any Managed Workplace feature. This one-way initiation of communication from behind the firewall of customers' IT environments assures that your customer networks are never compromised by your activities.

Managed Workplace is notably founded on an agentless architecture. This means that you do not have to introduce, explain or ever exonerate² the remote management and monitoring software that you use to deliver your new recurring revenue-generating services. All data gathering is template based, so that your customer's data privacy is fully protected and even auditable if required for compliance.

The vast majority of SMBs frequently deal with compliance requirements such as SAS-70, GLBA, HIPPA, etc. for highly confidential information and are required by law to have a secure environment to protect this information. Managed Workplace enables you to help your customers meet these regulations from an IT perspective.

As more and more small businesses become reliant on their IT infrastructure SMBs are anxious to protect themselves from viruses, malware, and other security risks (even small businesses such as automotive repair need computers to run their customer accounts, maintain parts inventory and to order supplies).

Managed Workplace enables you to deliver a baseline security assurance service that addresses the 3 key dimensions of SMB security:

- Through monitoring and reports we can ensure that business data is properly backed up;
- Continuous monitoring and reporting help detect viruses, worms, spamware and other malware;
- Performing Microsoft-endorsed security risk assessments on desktops and servers (MBSA)



² When things go wrong in an agent-based environment, the first culprit is always the agent that doesn't need to be on a system for it to do its job. Similarly, using an agent generates privacy concerns from customers that you would otherwise have to sell around.

Only Managed Workplace allows you the freedom to choose the most appropriate backup, AV and AS products for your customers. Your choice of product can be “snapped into” the security assurance framework of Managed Workplace to provide both best-of-breed protection and continuous assurance.

Managed Workplace provides the ability to remotely run and obtain MBSA Scan Reports on any Windows system without visiting the customer site to do so. These reports present Microsoft-endorsed security risk assessments that your customers need to maintain their regulatory compliance.

The MBSA reports are periodically generated and stored in Service Center for each device and provides information on how to improve your customer’s security posture by detecting common security vulnerabilities (configuration errors) and missing updates. It is possible to create alerts once vulnerabilities have been identified. Remote control can then be used to fix any problems identified.

Managed Workplace’s security patching features also provide a variety of patch reports that you can use to demonstrate to your customers that their systems have the most current set of security patches applied. By offering security patches as part of your security assurance service, you also demonstrate your ability to later up-sell your customer to a more extensive pro-active patching service for non-security patches.

3.6 Preventative Maintenance

We recommend that you package automated scripting of two preventative measures into your basic (e.g. \$149) service offer. This equips you to include a single preventative maintenance ingredient (common preventative measures) in your basic service offer package with room to up-sell more advanced capacity planning services.

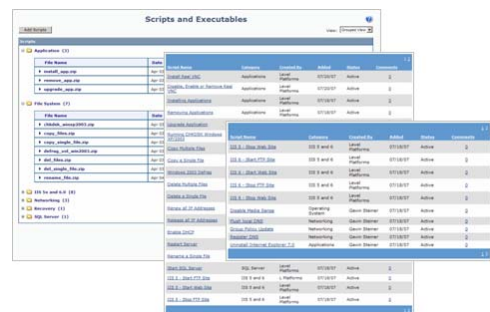
3.6.1 Automated Scripting

Managed Services can automate many common preventative measures tasks by using scripts that are launched on a scheduled basis.

A library of scripts is included with Managed Workplace and you can import and use your own scripts. You can also tap into our collaborative ecosystem to obtain scripts developed by other partners and contributed into the Managed Workplace community.

Two examples of common preventative measures that you could include in your basic service offer are:

- **Scheduled Shutdown** of Workstations. This script will schedule an automatic shutdown of all systems that you designate to help your customers save on energy costs and to reduce associated greenhouse gas emissions from excess power consumption.
- **Cleanup of temporary files.** This script will scan the filesystem to find and delete all files in temporary directories. It is also possible to use more complex scripts that can delete specific files, or use *Cleanmgr* to delete temporary Internet files.



Other examples of scripts include scripts to install, remove or upgrade programs that come with a silent install, scripts to copy or delete files such as temporary files and scripts to shutdown or restart systems and much more, determined largely by the needs of your customers and your imagination.

4.0 Quarterly Business Reviews and Reports

One of the biggest challenges that solution providers frequently experience is being able to properly demonstrate their value to clients.

Managed Workplace's reports provide the proof statements and support documents that you need to demonstrate value delivered as well as to justify future projects.

Formalizing a quarterly business review to discuss the delivery of your existing services:

1. Sets the expectation in your customers mind that you will be periodically reviewing with them the state of their IT environment and discussing with them opportunities that they may wish to consider to "get the most" from their spending on IT. This also positions you as a potential Trusted Advisor if you have not already attained that status with this customer.
2. Establishes a "non-sales call" setting for selling new opportunities. This helps break down a potential psychological barrier in the minds of many small business owners and places you on the inside of the defensive wall that they might typically erect to fend off sales pitches.
3. Enables you to build the case for new opportunities in a repeated, persistent and non-threatening way. For example, you can in one meeting present evidence that there is an issue building with certain configurations and obtain your customer's agreement that you should investigate options for resolving them at the next meeting. In your next meeting you can present your findings and recommendations for new services or products to overcome these previously identified issues.
4. Provides you the opportunity to demonstrate the benefits realized from overcoming previously identified issues through "before and after" comparisons. This builds your credibility as a Trusted Advisor.
5. Provides a regular opportunity to review with your customer their satisfaction with your services and also affords them the forum to introduce potential new opportunities to you. For example, in reflecting on their high level of satisfaction with your rapid remediation services, a customer might ask if you could offer extended coverage to other systems that you may not yet be servicing.
6. Creates a recurring vehicle for you to gain further insight into your customers' strategic business goals and current tactical issues. This insight is crucial for detecting new opportunities and to identify the best way to present these opportunities to your customers. For example, if your customer identifies that they need to improve cash flow and are concerned around rising electrical and cooling costs, you might identify replacement or consolidation opportunities for older power-hungry systems.
7. Presenting Managed Workplace reports to your customers on an ongoing basis also helps make their IT expenditure more predictable because they can be presented with information well in advance of having to spend the money to deal with issues. By showing them reports on the health of their environment, you can establish the case for future improvement projects.

- Using remote monitoring and management tools typically leaves no paper trail and consequently some customers might otherwise dispute your end-of-month billing for hours consumed by remote activities. However, Managed Workplace's Remote Management History report helps you justify and prove the work done remotely, by identifying the time, date and how long it took the technicians to fix an issue remotely. The Executive Summary and Work Completed reports also show evidence of the faster alert turnaround times and ticket turnarounds that you obtain from using Managed Workplace. Since this will help you contain any loss of revenue that would otherwise occur had you not used Managed Workplace with that customer, this reduces the pressure for revenue that you would otherwise have to replace via incremental sales of projects and services.

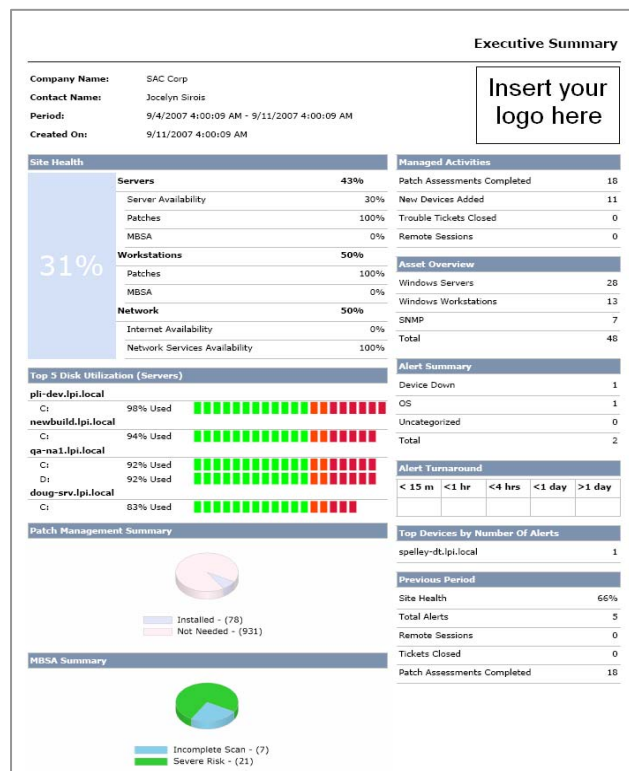
Creating high-impact business reports is easiest when targeting the proper audience. In addition to creating business reports for the SMB business owner, solution providers need to create reports for the following internal audiences too: technical team, sales team, and internal operations. Managed Workplace facilitates the creation of all these types of reports.

Managed Workplace allows you to schedule reports, as well as produce on-demand reports. All Managed Workplace reports, including ones configured by you, can be placed on an automatic schedule, including weekly, bi-weekly, monthly, or on quarterly basis. Solution providers can also export report content to Excel for further analysis.

4.1 Monthly Reports

Monthly reporting should be simple and should not require any additional configuration to retrieve client information. These reports should all be based on data that are being collected automatically, such as the following reports:

Executive Summary: The Executive Summary Report provides the overall status of an entire site based on network and server availability and stability, security of devices and resolution times for any alerts and trouble tickets that occur. The report also shows prior-period numbers so that you are able to show that your technicians have been proactive when resolving any issues.





Windows Server Health Report: The server health report establishes a performance baseline that can be measured over time and identify any areas for improvement. For instance, you can instantly identify any issues with disk utilization.

Work Completed Summary Report: This report summarizes all the work that has been performed for a customer each month, including summaries for the cleared alerts, closed trouble tickets, scripts that were executed and remote control sessions completed.

The screenshot shows the 'Work Completed Summary' report. It features a table with columns for 'Date', 'Summary', and 'Status'. The table lists various tasks such as 'Backup Server', 'Update Software', and 'Monitor System', along with their completion dates and statuses.



Site Performance Report: This report summarizes the most heavily stressed devices at a site. Using the report selector in Managed Workplace, you can report on the Top 10 devices by CPU Utilization, and by Memory Consumption.

Patch Status Detail Report: Patch Management reports shows the number of patches that have been successfully installed on a device or at a site. On a monthly basis, you should run a version of this report that will highlight just the security patches applied.

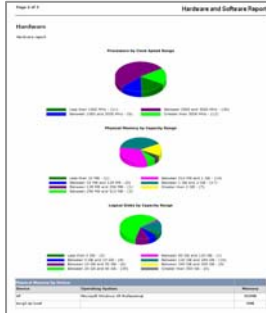


Website Monitoring Report: The website availability report shows clients the reliability of their website. Managed Workplace will automatically generate alerts for non-responsive websites which lets you address the issue immediately to minimize any impact on your customer's public facing IT such as e-commerce sites hosted either internally or with an external provider.

4.2 Quarterly Reports

Quarterly Business Reviews (QBR) allows the solution provider to review all data reports with their customer allowing them to make informed financial decisions when planning and budgeting for future IT requirements.

On a quarterly basis the following reports should also be included to summarize asset status and security assurance:



Site Hardware Summary & Device Asset Hardware Reports: These reports can be configured to report a hardware summary for the site as well as detailed asset reports for any device to provide comprehensive and accurate information on all devices. By reviewing these reports quarterly with your customers, you can identify any hardware that may be obsolete or discover software/applications that need to be upgraded or replaced.

Site Software Asset Report: This report shows the operating system inventory for the site and the software asset details for each system. This report can be used to identify any unauthorized or unlicensed software installs on each device. For instance, some companies may have corporate policies/restrictions on the software users can download to their systems.



Device Name	Operating System	Hardware Summary
Device 1	Windows	Processor: Intel Core i7-4790K, Memory: 16GB, Storage: 1TB
Device 2	Windows	Processor: Intel Core i5-4590, Memory: 8GB, Storage: 500GB
Device 3	Windows	Processor: Intel Core i3-4175, Memory: 4GB, Storage: 250GB
Device 4	Windows	Processor: Intel Core i7-4790K, Memory: 16GB, Storage: 1TB
Device 5	Windows	Processor: Intel Core i5-4590, Memory: 8GB, Storage: 500GB

Site Device Attributes Report: This report can be run with appropriate date settings to show the systems coming off of warranty contracts during the quarter. This generates the opportunity to up-sell the customer on a maintenance agreement for those systems.

Patch Status Detail Report: Patch Management reports shows the number of patches that have been successfully installed on a device or at a site. On a quarterly basis, you should run a version of this report that will highlight all the patches needed as this will help you up-sell a higher priced patching services offer. This report will also list unsuccessful installs and the number of patches that are still required. It is a good proof of work done and of work still to be done.



Appendix I – WBM Office Systems



How to Quickly Earn Recurring Revenue



“We’ve developed a meaningful working relationship with the people at Level Platforms. They understand our unique business requirements, not only from a technical standpoint, but also by offering support and guidance from a business perspective that has enabled us to enhance how we service our clients.”

- Brett Bailey
Manager, Marketing and Business
Development WBM Office Systems

Partner Profile

Company: WBM Office Systems
Location: Saskatoon, SK
Years in Business: 56
Partner Since: 2006

Business Value

- New customer acquisition
- Increased customer satisfaction
- Reduced troubleshooting time



Business Challenge

WBM Office Systems established its position as a solution provider by continually adapting and working with leading technology. The firm’s competitive advantage was dependent on delivering the enhanced proactive services while reducing operating costs.

Not a typical VAR, WBM provides many technical solutions, and doesn’t want to run separate businesses. Coaching was necessary to make the shift to managed services.

Partner Solution

Level Platforms and WBM designed a business plan that included a successful Open House Launching Event. Having 15 existing partners sign on immediately gave WBM a strong push towards its goal of transitioning all customers to recurring revenue contracts.

Benefits

With Managed Workplace WBM has a tool that consolidates all its needs. Integrated technology helps sales staff get a foot in the door with new clients, and lets it supplement the existing in-house IT personnel of larger clients.

Managed Workplace is capable of deeper penetration into a client’s network, which allows WBM to pinpoint the cause of problems promptly, saving time that was formerly used in troubleshooting.

Next Steps

WBM will continue to migrate the remainder of its customer base to recurring service programs, including additional managed services to compliment remote monitoring and break/fix solutions.

Corporate Profile

WBM Office Systems is a Microsoft Certified Small Business Specialist offering IT services to businesses in Saskatoon, Saskatchewan and the surrounding area. WBM is proud to be the largest integrated technology provider in Western Canada.

TRADEMARKS

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