The Business Owners

ESSENTIAL GUIDE

TO **I.T.** & ALL THINGS **DIGITAL**

Information Technology

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22 CRITICAL FACTS

EVERY BUSINESS MUST KNOW
TO MAXIMIZE THEIR COMPANY'S
EFFICIENCY, SECURITY,
EMPLOYEE PRODUCTIVITY &
PROFITS

FEATURING

Bill Ooms

& Leading Experts From Around the World

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CHAPTER 2

WHAT TO LOOK FOR IN AN IT PROVIDER?

BY BILL OOMS

If you've been in business any length of time, it's very possible you have a story or two you have told your friends or business acquaintances about an Information Technology (IT) mishap that has taken place in your company because of an error made by a less than competent technician. There are no shortages of horror stories about incompetent technology personnel who have caused more problems for the company they were supposed to be helping.

As with any industry, the quality of workmanship and professionalism within the IT vertical will range on the spectrum from superior to poor. Unfortunately, the trade even has its share of individuals that act in ways that are deceitful, dishonest, and unethical. Sometimes this undesirable behavior is driven by greed for money, but more often it's simply because they don't have the skills and competency necessary to resolve the issue in the right way. As a result, they will try to cover up their inadequacies by offering misleading or incorrect information accompanied by a poor work ethic, inadequate management skills, and pitiful customer service efforts.

You may or may not know that there is no regulation or established standards within this industry. That fact is a major reason there is such a variation in competence in the technology repair and consulting field. Literally anyone can claim to be an IT professional. In fact, many of

the technology businesses today were started because the current owner was fired or laid off from their job and couldn't find work anywhere else. That means many of the so-called "experts" are less than qualified to handle many technology issues faced by the growing demands of today's business world.

Think about it. Automotive mechanics, electricians, plumbers, lawyers, doctors, dentists, realtors, accountants, etc. are all heavily regulated to protect the consumer from receiving substandard work or from being deceived. There is a formal complaint, investigation, and disciplinary process in place in each state if any regulated professional violates the standards to which they have agreed to adhere. Unfortunately, this is not so in the world of technology. There are independent IT certifications that can be obtained, but there are no regulatory standards to which these individuals must adhere.

The good news is, despite the contingent of lackluster technicians as described above, there are a lot of very qualified and ethical technology consultants available today. Don't allow the previous paragraphs to discourage you in your search for an outstanding tech firm with which you can place your confidence and entrust the technology side of your business. They are definitely out there and this chapter will help you find the right fit for your business.

IMPORTANT CONSIDERATIONS WHEN HIRING YOUR IT PROVIDER

Below are numerous critical issues you must consider when hiring your IT provider. These considerations are arranged in the areas of Customer Service, Maintenance and Monitoring of Your Network, Backups and Disaster Recovery, and Technical Expertise and Support. When interviewing a prospective technology provider, make sure your investigation includes these very important matters as they relate to your working relationship. They will prove to be vitally important to the selection of the right technology firm for your business.

CUSTOMER SERVICE

Accessibility

Any reputable consultant will answer their phones live during their normal business hours, which will typically be from 8 a.m. to 5 p.m.

However, there should also be an after-hours emergency number, including weekends, that you can call if a problem arises. We all know that problems don't always occur during normal business hours and you need to be assured your IT provider will be available when needed.

Guaranteed Response Time

It is imperative that your consultant can guarantee in writing to have a technician working on your problem within a certain time frame after you call. This document is called a Service Level Agreement (SLA) and should be standard protocol for your provider.

Listening Skills and Appropriate Responses

Good consulting firms will train their entire staff to excel in customer service. This begins with listening to a client's concerns, understanding them, and responding to them in understandable terms. The technician should have the "heart of a teacher" and be willing to take time to thoroughly answer your questions. When you ask a question you should not be made to feel stupid by the response you receive. If the technician comes across as arrogant or impatient with your questions, that's not the person you want to use as your IT provider.

Proactive Approach

Your provider should routinely and proactively conduct regular technology business review meetings with you to look for new ways to help improve your operations, lower your costs and increase efficiencies. Their goal should be to help your business become more efficient, profitable and competitive in your marketplace. These meetings should at least be annually, but may be as often as monthly, depending on your business needs.

Clear and Detailed Invoicing

Invoicing details from your provider should never be a secret. Each invoice should definitively show the work that has been done, why it was done, when it was done, and how much time was spent on the task.

Properly Insured

If your provider causes a problem with your network that results in loss of hours, days, data or revenue, the provider needs to be held liable. If your provider is not properly insured, the chances of your recovering any monetary damages will be minimized. Additionally, if one of their technicians is injured while at your office, your provider must provide

worker's compensation to cover their employee's injury and the resulting lost wages.

A few years ago one of the big box electronic stores were served multiple lawsuits from customers for damages incurred as a result of their technicians' unethical and irresponsible behavior. The technicians were copying and distributing personal information obtained from their customers' personal computers and laptops brought in for repair. One customer's laptop was lost and the employee tried to cover up the negligence. These unfortunate types of activities are evidence you need to make sure your provider is properly insured for your own protection.

Guaranteed Completion Time and Budget

It is imperative to have a fixed price and a guaranteed completion time in writing from your provider. A reputable provider will have no problem giving this to you. Don't allow a provider to quote only "time and materials" because it leaves the door open for additional add-ons that could become very costly.

MAINTENANCE AND MONITORING OF YOUR NETWORK

Remote Monitoring

Your provider should insist on remotely monitoring your network 24-7-365 to keep critical security settings, virus definitions and security patches up to date and to prevent problems from turning into downtime, viruses, lost data or other issues. If your provider will not commit to this type of monitoring, don't do business with them. An effective remote network monitoring system will keep your business secure and will alert your provider to potential problems that can be addressed before they become bigger problems resulting in network downtime.

Monthly Reports

A reputable provider will provide you with a monthly report that shows all the updates, security patches and the status of every machine on your network so you know for sure your systems have been secured and updated. These reports will show you on a regular basis the overall health score of your network and the updates to your antivirus, security settings, patches, hard drive space, backups, speed and performance, etc.

Network Documentation

It should be standard procedure for your provider to supply you with written documentation detailing what software licenses you own, critical passwords, user information, hardware inventory, etc. In essence, these are the "keys to the kingdom." It is imperative that you not allow your IT provider to solely hold this information. If they are the only ones to hold this information they could block you from your own business. While it is highly unlikely this would happen, you must never take that risk. Every business should have this information willingly shared with them by their IT provider in written and electronic form at no additional cost. Your provider should also perform a quarterly update on this material and make sure certain key people from your organization have this information and know how to use it. This enables you to have complete control over your network.

Again, you should never allow an IT person to have sole control over this information. This translates into them having control over you and your entire company. If your provider refuses or is reluctant to share this information with you, do not enter into a working relationship with them.

Capable Staff of Technicians

Your provider should have detailed network documentation and updates on your account enabling any of their technicians to be able to pick up where another one has left off. If your regular technician becomes ill or takes an extended vacation, other technicians should be able to step right in without any disruption to your business workflow. They should be as familiar with your network and processes as your regular technician.

All-Inclusive Managed Service Plan

One of the more popular service plans offered by provider firms today is an "all-inclusive" managed service plan. These plans are good things to have because they will save you a lot of time and money in the long run. However, make sure you really understand what is and isn't included in the plan. Sometimes what is offered as an "all-inclusive" managed support plan isn't always as "all-inclusive" as you might think. You should be fully aware of any possible "gotcha's" hidden in the fine print. The following is a list of things you will want to consider:

Are phone and email helpdesk included?

Are network upgrades, moves, and adding or removing users included?

Are hardware and/or software included?

What about 3rd party software support?

What are the costs/consequences of early cancellation?

What if you aren't happy with their services? Do they offer a money-back guarantee?

If the hardware and software are included, what happens if you cancel the contract?

Is offsite backup included and to what degree?

If you have a major disaster, is restoring your network included?

Are onsite support calls and support to remote offices included?

Are home PCs used to access the company's network after hours included?

Whenever you enter into a contract, you should always have legal counsel review your agreement, especially if it involves a lengthy and expensive project. The money you spend on a qualified attorney will go a long way to ensure a trouble free project.

BACKUPS AND DISASTER RECOVERY

On-Site and Off-Site Backups

Your provider should insist on monitoring an off-site as well as an on-site backup system for your business. There are a variety of backup systems you can utilize and a qualified provider can help you determine what backup system will work best for your situation. Personally, I would never allow any business in today's environment to use tape backups because they are extremely unreliable and there are much safer systems available. Your provider company should be able to give you 24/7 monitoring with backups every 15 minutes, an off-site storage option, data restores as needed, and a virtualized server in case of a disaster.

Testing Your Backup System

You won't know if your backup system works unless you test it. Many businesses that don't use a professional IT provider often miss this very important step in their backup plan. Your provider should regularly perform a test restore from backup to make sure your data can be recovered in the event of an emergency. The worst time to "test" a backup is when you desperately need your data restored.

Back Up Before Upgrading Equipment and Software

A qualified provider will insist on backing up your network BEFORE performing any type of project or upgrade. This is a simple precaution in case a hardware failure or software glitch causes a major problem.

Written Disaster Recovery Plan

Your provider must be able to quickly restore your data and network in case of a disaster and this plan must be in writing. It should also be part of your overall business disaster recovery plan that is made available to the appropriate individuals within your organization.

TECHNICAL EXPERTISE AND SUPPORT

Qualified and Knowledgeable Help Desk

We have all experienced those customer service calls when we are connected to another country and have no choice but to try to understand someone that has such an extreme foreign accent that it makes the conversation painstakingly difficult to understand. You feel exhausted and frustrated at the conclusion of those calls. You don't need that type of anxiety when communicating with your IT provider help desk. Making sure your provider has an in-house help desk, staffed with cooperative, friendly, helpful and easy-to-understand staff is a very important consideration. Make sure they don't outsource this service to a third party or overseas. You don't want someone with no knowledge of your company trying to assist you. This only creates confusion and delays. You want to work with people you know and trust.

Ticketing System

Your provider must have a well-run ticketing system to track issues and resolutions. A good ticketing system will enable your provider to quickly look up any problem they already encountered and the associated fix. This will prevent redundant research time and enable a prompt response to your current issue.

Promptness and Professional Appearance

When technicians work on-site at your location they should arrive on time and they should be dressed professionally. Your provider should be very proud of the promptness and professionalism of their technicians and you should feel comfortable having them in your office.

Qualified to Support Your Unique Line of Business Applications

Your provider must be familiar with and be able to support your unique line of business applications. They should also take ownership of the problems of all your business applications, even if they didn't install it. That doesn't necessarily mean they can fix faulty software, but they should be the liaison between you and your vendor to resolve any problems you are having and make sure these applications work smoothly for you.

Taking Ownership of Your IT Needs

When something goes wrong with your Internet service, phone systems, printers or other IT services, your IT provider should "own" the problem so you don't have to worry about trying to resolve any of these issues. You don't want a provider that will say, "That's not our problem to fix." A provider that is willing to take ownership is a provider that will serve you well.

DEVELOP A LASTING PARTNERSHIP AND RELATIONSHIP WITH YOUR IT PROVIDER

After selecting your provider, it will be in your best interest to develop a long-term relationship with them. They can save you time and money by increasing your efficiencies and giving you a competitive edge. Not every relationship will work out, but when you find a good relationship, stick with it and build on it.

In addition to the great customer service you receive from your IT provider, there may be other business benefits to having a long-term relationship. Your IT provider will interact with possibly hundreds of businesses over the course of time. There may be opportunity for your provider to refer business to you based on the solid relationship you have built. Of course, you may also refer business to your IT provider. This can definitely be a win-win strategy.

About Bill

Bill Ooms has over 30 years of experience in computer consulting. His business and economics education from Purdue, along with his experience, help Bill provide cost-effective recommendations for using today's technology to meet the needs of small businesses. He has consulted for major corporations as well as dozens of small businesses. He has developed several applications, taught classes, worked extensively with networks and the Internet, and has designed and planned various systems. Bill currently is president of the Greater Lafayette Information Technology Society, and is serving on the Board of Directors for the Greater Lafayette Public Transportation Corporation.

As president and owner of Business System Solutions, which is based in West Lafayette, Indiana, Bill has focused on customer service to meet the IT needs for small businesses. Bill's clients consider him an expert at all things technical. His goal is to help business owners gain incredible peace of mind by eliminating costly, frustrating, and time-consuming problems that most businesses have with technology.

Business System Solutions specializes in providing management and support for all technology in small businesses. This includes support for computer networks and working with hardware and software vendors whose technology is used by those businesses. They do this with friendly, proactive, and responsive service.

Bill is the author of *Small Business IT* in which he gives advice on how to find the right computer consultant for your business. He also gained recognition in 2013 for co-authoring the book *The Tech (Multiplier)* which received Amazon Bestseller status in seven different categories.