

Jack-Daniyel Strong

Jack is the President of J-D Strong Consulting, Inc. and Strong Solutions. As a member of the Apple Consultants Network, grew from a one-man consultancy into an Apple Authorized Reseller and Service Provider for the Eastern Washington and Northern Idaho area. Most recently, JD joined the team of Watchman Monitoring to help with documentation and support.



Setting Up a Support Desk System Properly

Pre Amble

Which Help Desk System

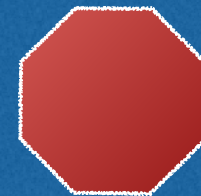
- What are we talking about?
- Why consider a PSA?
- What makes up a PSA?
- Who are the Major Players?
- Should you switch?
- Making the Switch?

What are we talking about?

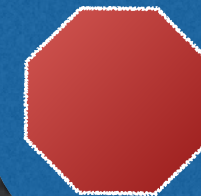


Why consider a PSA?

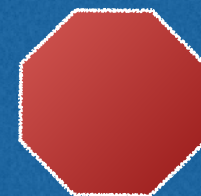
**Customer
Relationship
Management
(CRM)**



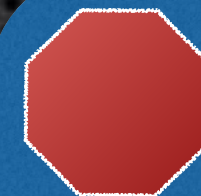
**Resource
Management**



**Financial
Management**



**Efficiency
Management**



What Makes Up a PSA?

**Customer
Relationship
Management
(CRM)**

**Resource
Management**

**Financial
Management**

**Efficiency
Management**

What Makes Up a PSA?

**Customer
Relationship
Management
(CRM)**

- Marketing
- Sales - Leads
- Support

What Makes Up a PSA?

**Customer
Relationship
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(CRM)**

**Resource
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**Financial
Management**

**Efficiency
Management**

What Makes Up a PSA?

Resource Management

- Service Level Agreements (SLAs)
- Set SMART Targets
 - **S**pecific
 - **M**easurable
 - **A**greed
 - **R**ealistic
 - **T**ime-related

What Makes Up a PSA?

**Resource
Management**

- Project Management
- Tasks
- Scheduling

What Makes Up a PSA?

**Customer
Relationship
Management
(CRM)**

**Resource
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**Financial
Management**

**Efficiency
Management**

What Makes Up a PSA?

Efficiency Management

- Time Tracking
- Monitoring
- Management
- Automation



What Makes Up a PSA?

**Customer
Relationship
Management
(CRM)**

**Resource
Management**

**Financial
Management**

**Efficiency
Management**

What Makes Up a PSA?

Financial Management

- Invoicing
 - Expense Recovery
 - Project Accounting
- Quotes
- Metrics & Reporting
- Collection

What Makes Up a PSA?



Who are the Major Players?

- Autotask
- ConnectWise
- RepairShopr
- Zendesk

Which Should You Choose?

Should You Switch?



Should You Switch?

- Integration(s)
- Automation

What Makes Up a PSA?



Making the Switch



Making the Switch

- Research
- Plan
- Prepare
- Test
- Implement

Structuring your Support Desk

- Narrow the focus with Views
- Creating Service Levels
- Squelching and focusing notifications

Process



Process

- Normalization makes your process more efficient.
- Defined workflows allow another tech to pick up when another left off.
- Efficiencies are found by documenting and automating your process.

Narrow the focus with Views

- Sorting and Organizing Tickets
- Ticket Types
 - General Questions
 - Sales Questions
 - Technical Support
 - Notifications

Views

- Titling views
 - Clear and accurate descriptions
- Formatting views
 - Add important data (e.g. last updated)
- Avoid large complex results
 - Views only display 30 tickets/page
- Bookmark views

Squelching and focusing notifications

- Notifying customers when you're out-of-office
- Sending customer satisfaction score follow-ups
- Routing your priority customers automatically
- Notifying when a ticket has a certain number of incidents
- Adding and removing tags
- Automatically assign tickets by channel
- Escalating tickets
- Decreasing spam emails and automated responses



Automate your Support Desk

- Automated Messages
- Following up

Automated Messages

- Macros
- Organize into job function
- Standardize your message

Following Up

- Tags
- Automations
- Triggers

Your Support Desk as messaging hub

- Integrating with other tools
- Web-based forms for useful support requests
- Dealing with Text Messages & Phone Calls

Integrating

- Watchman Monitoring
- Addigy
- RMM Tools
- etc.

Web-based forms for useful support requests

- Web-based forms

Text Messages & Phone Calls

- Zendesk Talk
- Zendesk Text
- Zendesk Chat
- RingCentral
- Textline SMS Messaging
- LiveChat
- Drift Chat

Building your Support Center

- Organizing a FAQ
- Reducing requests with support documentation.

Organizing a FAQ

- Do you even know what your Frequently Asked Questions are?
- Organize and tag tickets with issue topics.
- Build out from previous replies.

Reducing requests with support documentation.

- Ease of Access (Searchable)
- Up-to-date Information
- Take the Knowledge Out of One Person's Head (or Computer) and Put it Somewhere Anyone Can Use It
- Ticket replies become references to Support Articles

Documentation

What to Include

- Specific Issues
- Support Articles
- Best Practices
- Business Resource Location (Installers, Software, Tools, etc.)
- HR Resources
- ICE: In Case of Emergency (Fire, Power Loss, Flooding)

Wrapping Up

- Why consider a PSA?
- What makes up a PSA?
- Who are the Major Players?
- Should you switch?
- Making the Switch?
- Process is King
- Narrow the focus with Views
- Squelch and focus notifications

Questions?



Jack-Daniyel Strong
jack@spokanemac.com
Tweeter: @SpokaneMac
MacAdmin Slack: @jackdaniyel