



# Managed IT Success Checklist

Becoming a Managed IT Services provider requires preparation, dedication to learning the space, and discipline to make strategic changes within your organization.

The following elements are critical to your success as you transition your businesses with Managed IT Services.



## ☐ LEADERSHIP COMMITMENT

The leadership team must be committed to adopting the business model and becoming the change agents within the organization. The leadership team will construct and carry out a vision the entire organization can understand and operate. A C-level champion must assist with the day-to-day functions and planning to get Managed IT Services off the ground, from process adherence to assistance closing deals. CollabRance will schedule regular check-ins with Service Providers to discuss progress and opportunities for improvement.

## ☐ SUBJECT MATTER EXPERT

The Managed IT sales cycle is different than most. It is a needs driven sale that requires a specific skill set, as well as a higher level of knowledge about technology's role in operating a business. Because of the complex nature of IT, and the activity level and discipline it takes to find and close deals in this space, it is imperative this role is 100% dedicated to Managed IT and fits the profile for success. If goals are not met, it is typically because you don't have the right person in this role.

**ACTION:** Hire an SME using the success profile and our PathShare® HR Services team, or if you already have one, allow us to evaluate your SME against the success profile. PathShare has created a success profile for this sales role and can assist with compensation plans specific to a Managed IT sales specialist.

## ☐ CAPABLE TECHNICIAN WITH PEOPLE SKILLS

You need an engineer who can help the SME with pre-sales solutioning and complete the project work associated with Managed IT Services. This requires good working knowledge of computers, servers, and network infrastructure (e.g. switches, routers, firewalls). Their active role in the sales and support process will require the ability to build rapport with customers and their team. This person should have 5+ years' experience implementing and administering servers and networks.

**ACTION:** Hire an engineer using the success profile and our PathShare team, or if you already have one, allow us to evaluate your engineer against the success profile. PathShare has created a success profile for this technical role and can assist with compensation plans.

## ☐ A BUSINESS PLAN

Building a Managed IT Services business requires fundamental changes in strategy and operations. New processes that create efficiencies and control can guide you to profitability and success. CollabRance has developed a 90 Day Plan to keep us on track to build a strong foundation together. Other key components for success would include assistance with hardware and carrier services, as well as a marketing plan that includes lead generation tactics. CollabRance can help refer you to different marketing resources if needed.

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## WORKING WITH COLLABRANCE

If you are ready to transition your business, contact Collabrance for a way to enter this critical segment of office technology.

Let us help you with your next steps:

- Training and best practices
- A standard set of solutions to take to market
- Sales and onboarding processes
- Marketing resources
- Activity and planning reports

Our knowledge, experience, and comprehensive technology solutions allow you to keep your most valuable resources in the field generating revenue while we take care of the day-to-day issues for your customers.

Collabrance is committed to providing exceptional service that helps you keep your customers for a life. Together we can successfully transition your business.

“Collabrance has the expertise on staff, it’s one less thing we have to worry about, and it lets us focus on what we do best.”

Chap Breard  
MOEbiz



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