Creating OBVIOUS SOPs

Raj Goel, CISSP

http://www.rajgoel.com/?s=dojo
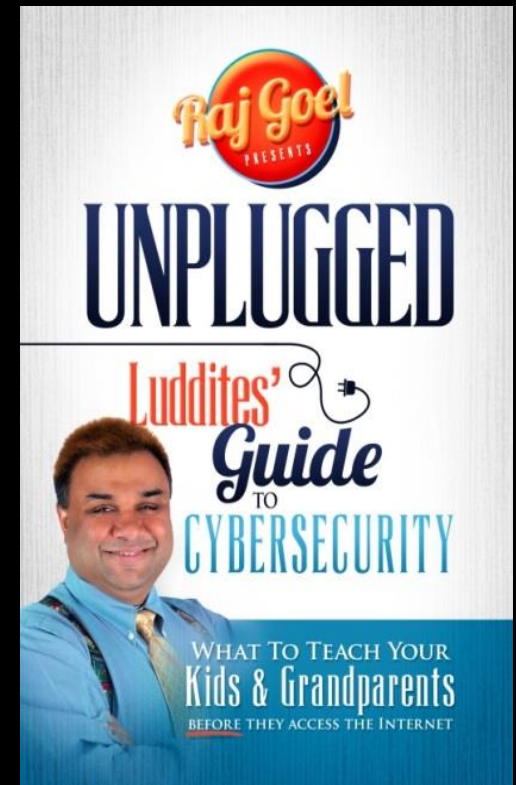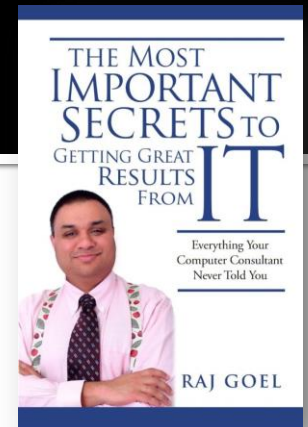
Raj Goel, CISSP

» Author, entrepreneur, IT expert and public speaker, Raj Goel is globally known as the go-to man in cyber security and privacy law. He is committed to educating individuals and organizations about online safety and how to protect their most important assets – **people and data**. His expert advice helps individuals, companies and conglomerates navigate their way through the world's ever-changing technology and increasingly complex IT compliance laws. He often appears in the media and at conferences world-wide to educate the public on cyber-security and digital privacy, a subject he is passionate about.

> » **Security, Civil Liberties anda Peace of Mind**

» When you need the right approach to complying with HIPAA/HITECH, PCI-DSS or simply protecting your assets, Raj Goel, as any of his loyal clients will tell you, is the man to call upon. Raj's credentials are impeccable. A 25-year veteran of the IT industry and an expert in online security, Raj has personally consulted with organizations ranging from Fortune 100 corporations to small family companies to governments world wide.

» Raj is fueled by his passion for enhancing Civil Rights in Cyberspace, his love of helping people keep themselves, their families and their companies safe online. He is available as a consultant and a public speaker and often sought after by major media outlets and companies.

» **Key highlights:**

- **Author,** "UNPLUGGED Luddites Guide To Cybersecurity", **Amazon**, 2015
- **Author,** "The Most Important Secrets To Getting Great Results From IT", **Amazon**, 2012
- **On-Air Television Cybersecurity Expert**, **WPIX11**, New York City (2013-present)
- **On-Air Cybersecurity Expert**, Columbia News Tonight, **Columbia University**, NYC
- **Keynote speaker**, NCSL 2013, **Government of Netherlands**, The Hague, Netherlands
- **Keynote speaker**, **Government Of Curacao**, 2013

- **Keynote speaker**, "**what should MSP's know about compliance**", **Datto** partner conference, 2013
- **Author**, "Googling Your Privacy and Security Away", **Infosecurity Professional Magazine**
- **Author**, "Trends In Financial Crimes", **Infosecurity Professional Magazine**
- **Author**, "Life Of A Child (2014) – raising a generation of cyber-at-risk youth", **Infosecurity Professional Magazine**, 2014
- **Author**, "Welcome To The World Of Dating Sites", **Infosecurity Professional Magazine**, 2015
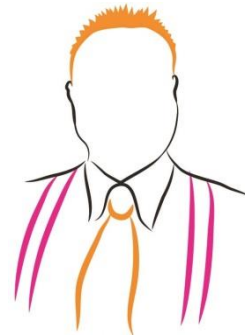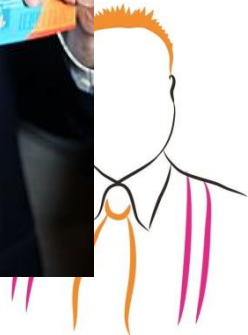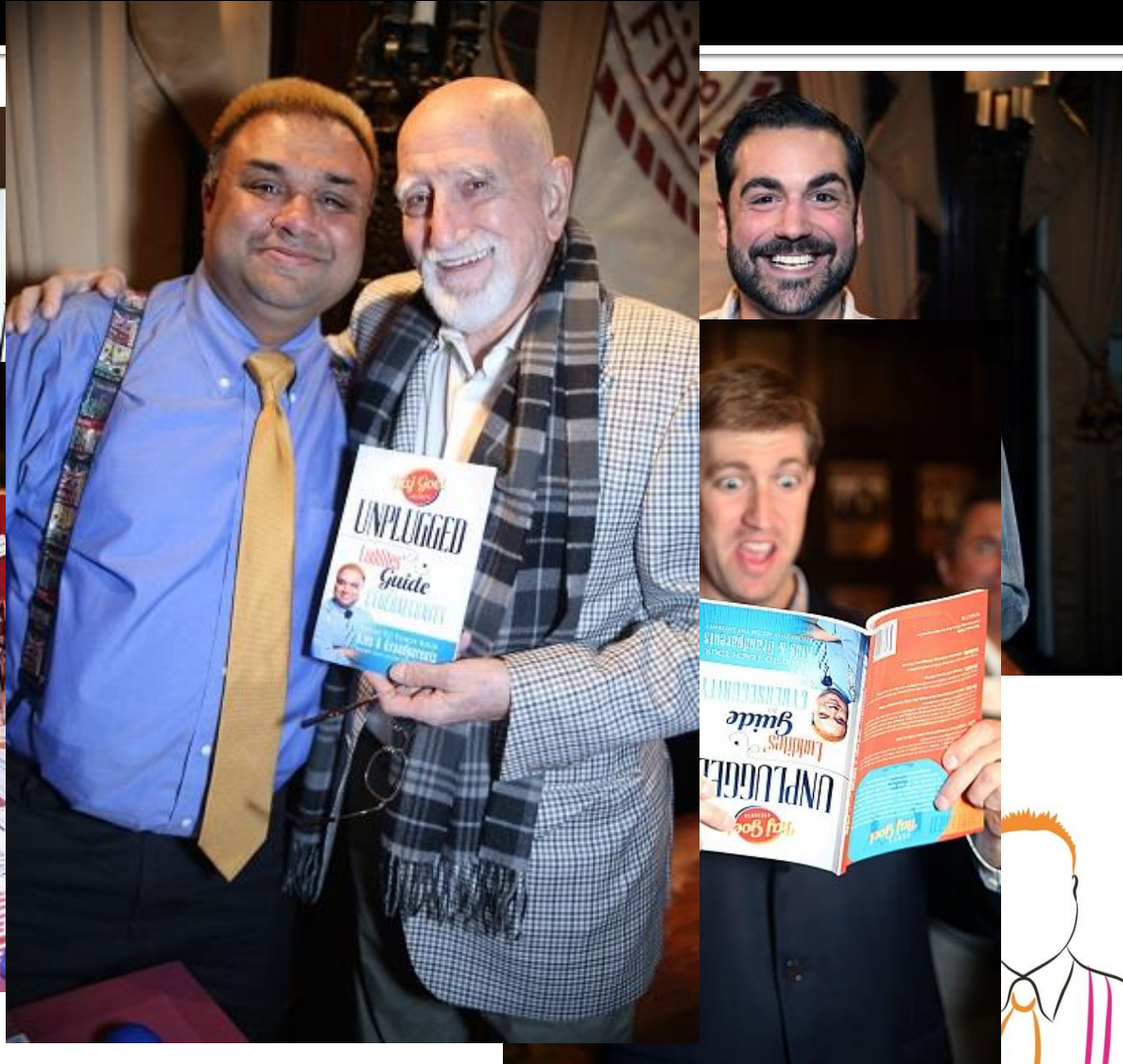
Media Appearances

Raj Goel, CISSP – MSP Credentials

- » **Keynote Speaker – DATTO 2013 – What MSPs should know About Compliance**
- » **Presenter/Speaker:**
  - **Cyberoam** Partner Conference 2014
  - **Cyberoam** Webinars
  - **Continuum** Navigate 2015
  - **MSPRadio**
  - **ITNation** 2015
- » 2014 Finalist, TechnologyMarketingToolkit (Robin Robins)
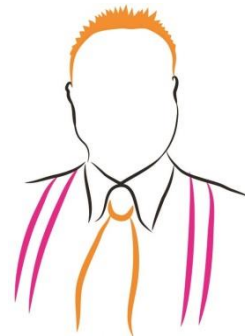- » **Author**, 2 books
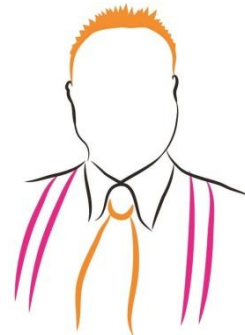
Book 2 Launch Party!!

About BRAINLINK

- ✓ Founded in 1994

- ✓ Profiled in NYTimes, Entrepreneur, PBS, WPIX11, etc

- ✓ Passionate about SOPs, SOTs, Process and Profitability

- ✓ Award Winning MSP – 2015 SmartCEO Magazine Winner for our "SOP Culture"

Why SOPs?

"When I say that the company's prosperity rests on such things as our <u>sixty-six-steps-to-clean-a-room manual</u>, I'm not exaggerating,"
J.W. Marriott Junior

http://www.economist.com/news/christmas-specials/21591743-be-my-guest
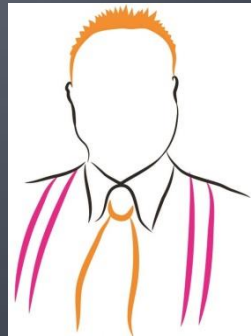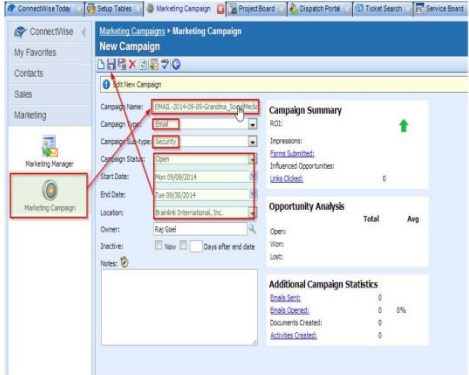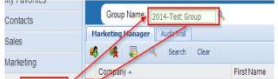
What's an SOP?

Standard Operating Procedure

- It's how you do something repeatedly, without deviation or failure
  - Any changes or updates are reflected in an updated SOP

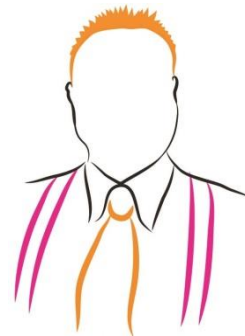## No great brand thrives without building SOPs

SOP Template

SAMPLE SOP		
Purpose: This is how we document repeatable, reproducible processes **Audience: Brainlink Technical and Marketing Employees**		
Step#	Description	Screenshot

Stay tuned till the end to get your free SOP template.

SOP Example

brainlink
<CLIENT>
<TITLE>
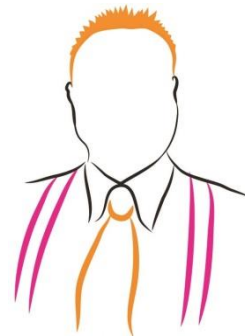Page | 1 of 1
Last Updated at 2/16/2014 11:15 PM by Raj   Author

Step	Description	Screenshot
1.		
2.		
3.		
4.		
5.		
6.		
7.		

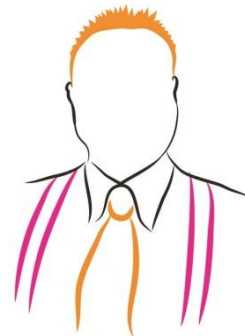- Brainlink's SOP template
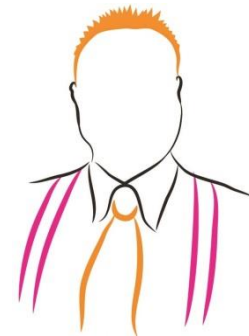
Brainlink's SOP Culture

- Our team lives by this mantra
  1. You are either USING an SOP
  2. Or you are MODIFYING an exiting SOP
  3. Or you are CREATING a new SOP
  4. Or you're looking for another job
- In 2014-2015, I hired 14 techs.
  - 12 were terminated.
    - 10 for not adopting the SOP culture.
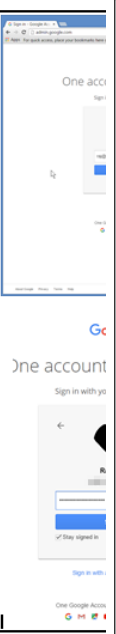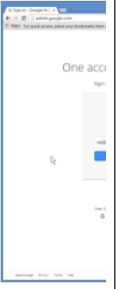
What are OBVIOUS SOPs?
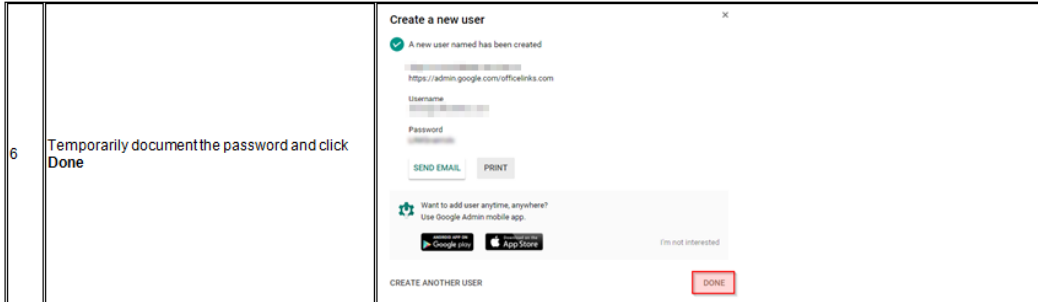
#	Setting up a new ▓▓▓▓▓▓ employee	SOP Links
1	Gmail account, alias (if any) and distribution groups	SOP - ▓▓▓▓ - Gmail - Creating a New Account SOP - ▓▓▓▓ - Gmail - Creating an Alias
2	Add to LASTPASS and share groups	SOP - ▓▓▓▓ - Adding a new user to LASTPASS
3	Add to SLACK	SOP - ▓▓▓▓ - SLACK - Adding Employees to SLACK
4	Add to ASANA	
5	Add to ▓▓▓▓▓▓▓▓	SOP - ▓▓▓▓ - Creating HOSTEDSUITES account
6	Add to ▓▓▓	SOP - ▓▓▓▓ - ▓▓▓ - Adding ▓▓▓▓▓ Employee to ▓▓▓
7	Add to ▓▓▓▓▓	SOP - ▓▓▓▓ - Add New Employee to ▓▓▓▓▓

- ■ All the SOPs needed to setup an Employee

Example #1 – Creating a GMAIL Account

SOP - CLIENTNAME - Gmail - Creating a New Account

- Document the "gee, everyone knows this"

Example #2 – Creating a GMAIL Alias

■ This was created after I wasted an hour
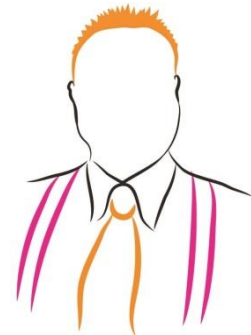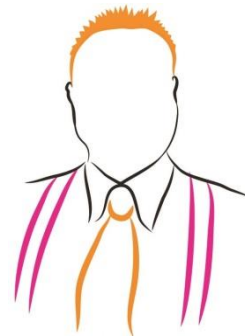
Example #2 – 5 Step SOP
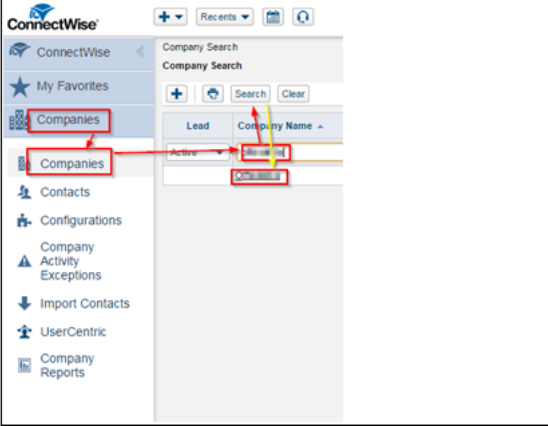
Brainlink - SOP - Connectwise - Setting Default Tech For A Client

Step	Task	Screenshot
1	Login to Connectwise	
2	Click **Company -> Companies**	
3	Enter **CLIENT NAME in search box** **Click SEARCH** **Click CLIENT NAME in results area (yellow arrow)**	
4	Click **TEAM tab**	
5	SOP Complete	

- This will save you hours…

Key Benefits

- Lower Staff Training Costs
- Better Employees
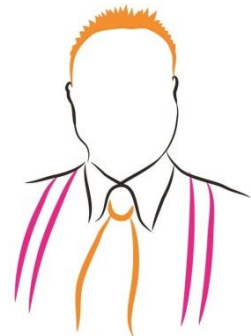- Consistency in client experience
- Better Documentation

Key Challenges

- Your techs don't know HOW to document properly
- You don't know how to TRAIN them in proper SOPs
- Your team lacks the SOP Culture

Accelerating Staff Training

- Build a list of WHAT you want your employees to learn

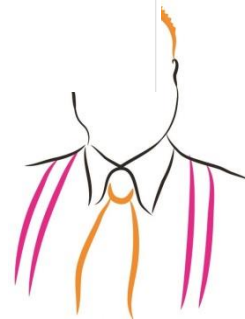| #	Type	SOP
1	Core Setup	101-BRAINLINK-SOP-Cyberoam-Initial_Unboxing_and_Setup
2	Core Setup	102 SOP - Brainlink - Cyberoam - Upgrading Firmware
3	Basic Networking Setup	Setting up Network Interfaces - SOP Needed
4	Basic Networking Setup	SOP - Brainlink - Cyberoam - Creating Network Hosts Objects BRAINLINK-SOP-Cyberoam-Adding Network Services Objects
5	Basic Networking Setup	Setting up Firewall Rules - SOP Needed
6	Basic Networking Setup	904 SOP - Brainlink - Cyberoam - Creating Virtual Hosts
7	Basic Networking Setup	Configuring Static Routes - SOP Needed
8	Basic Networking Setup	Setup DHCP Scopes - SOP Needed SOP - Cyberoam - DHCP - Create Static DHCP Reservations
9	Basic Networking Setup	905 Brainlink - SOP - Cyberoam Establishing Site to Site VPN between two Cyberoams
10	Basic Networking Setup	SSL VPN - Must determine which SOP to keep BRAINLINK-SOP-CYBEROAM-SSL VPN Configuration Setup 906 SOP - Brainlink - Cyberoam - VPN - SSL VPN Cyberoam Setup .SOP - Brainlink - Cyberoam - VPN - SSL VPN Cyberoam and Windows 7 Setup v1.0
11	Basic Networking Setup	Load Balancing - SOP Needed
12	Security and Reporting Setup	.BRAINLINK - SOP - Adding Firewalls To iView v1.0
13	Security and Reporting Setup	SOP - Brainlink - Cyberoam - Set per user internet access, web filter, applications policy 906 Brainlink-SOP-Cyberoam-Web Filtering-Applying to All Network Traffic BRAINLINK-SOP-Cyberoam-Pushing Web Filter Policies to Multiple Cyberoams
14	Security and Reporting Setup	SOP - Brainlink - CCC - Creating and Deploying the CryptoWall IPS Policy
15	Security and Reporting Setup	920 Brainlink - SOP - CYBEROAM-Cyberoam_SSO_AD_Setup SOP - Brainlink - Cyberoam - Troubleshooting CTAS and SSO Related Timeouts
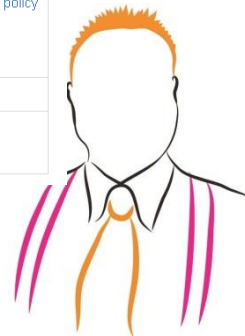
Accelerating Staff Training

- Build it into your hiring process

New Hire Training Process

Week	Tasks	Pages
1	a. W2, employee agreement, AUP, NDA signing	
	b. Skype, text, email TEAM COMMUNICATION training • Daily team call status updates • How to respond to SKYPE STATUS UPDATE requests • How to respond to TEXT STATUS UPDATE requests • Daily EMAIL status summary	
	Developing SOPS	SOP - Brainlink - Greenshot - Setup and Use
	Accessing the CONTINUUM A+, Network+, MCSA, MCSE training portal	SOP - Brainlink - Training - Accessing Certification Training from ConnectWise
	c. ConnectWise Training Completion • Training Video: http://sop.brainlink.com/files/.private/2014-08-03%20-%20Brainlink%20ConnectWise%20Training%20-%20Distilled.mp4 • Timesheet tracking & review	Brainlink - SOP - Creating Configurations in Connectwise Brainlink-SOP-Creating an SOP and Posting it to Connectwise SOP - Brainlink - Continuum/Connectwise - Opening a NOC Ticket to Resolve Backup issues BRAINLINK-SOP-Creating Service Order Templates SOT from SOP
	b. Continuum Ticket Handling	SOP - Continuum - Creating and Assigning COMMUNICATOR
	c. Read and be able to discuss Raj's Book	
	a. Daily Support/Ticket handling • EMAIL response training • Raj or Shival review ALL client-facing communications	
	b. Ability to search/find data in CONFLUENCE, SOPS, CONNECTWISE on our clients/processes	
	Read the BRAINLINK MSP Agreement and SAMPLE PROPOSAL	

Week	Tasks	Pages
2	c. ND Reports - Phase 1 (run) & Phase 2 (reporting)	BRAINLINK-SOP-Generating Network Detective Reports BRAINLINK-SOP-Importing NetworkDetective Data Into Connectwise
	d. Configuration / Confluence Updates	
	e. Perform DAILY BACKUP & IVIEW reviews	SOP - Brainlink - Continuum - Vault DBR Process Daily Backups Review Template BRAINLINK-SOP-DATTO-recover Off Datto Vault into ESXi local store
	f. Brainlink RATES & CONTRACTS review	
	a. Runbook review	
	Tech has read a client runbook.	
	Can answer:	
	How many locations?	
	Printers?	
	Who has Dymo (or timberline or Bloomberg)	
	What is their wifi password?	
	How many servers, desktops, which firewall, etc.	

19

Accelerating Staff Training

- Discuss it in interviews – HIRING & REVIEWS

Current NEW HIRE 90-day training runbook: 997 pages
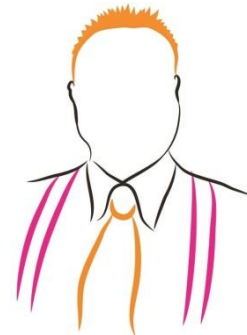
Develop the RUNBOOK

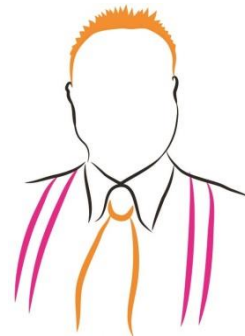- ## Runbooks are CRITICAL to focused training

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Develop the RUNBOOK

- ## Ours is 997 LEGAL pages long

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20	Moving a User between Databases	878
21	Report – 8/27/13	879
22	WEEK7 – Windows	881
23	Removing Users from a Distribution list	938
24	Adding Users to a Distribution list	940

Develop the RUNBOOK

- ## We build them for client hires as well

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Track The Training!!

- ## Connectwise is your friend

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Pay The Piper

Service Team Member Roles

Level	Title	Level Certifications	Required Certifications	Base Annual Salary TBD
1	Desktop Technician	Connectwise Training, Continuum Certified IT Expert	0	
		CompTIA A+,	2	
		MCSA Desktop 1 (680 or 687)	3	
2	Desktop Administrator	MCSA Desktop 2 (685 or 688),	4	
		CompTIA Network+ OR CCNA	5	
		Cyberoam CCNSP Certified	6	
		VMWare VTSP,	7	
		VMWare VSP	8	
3	Systems Engineer	CompTIA Security+,	9	
		MCSA Server (410)	10	
		MCSA Server (411),	11	
		MCSA Server (412)	12	
		Datto	13	
4	Senior Systems Engineer	MCSE Server (413)	14	
		MCSE Server (414),	15	
		VMWare VCP	16	
5	Virtualization Rockstar	All Above Certifications	ALL	

- We tie raises & bonuses to training

How do you do this for yourself?

- Adopt the SOP mindset
- License our SOP library
- Develop the SOP CULTURE
- PROFIT!!!

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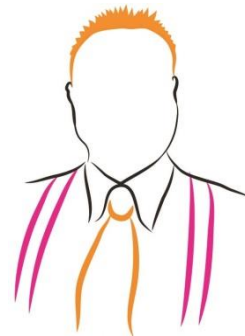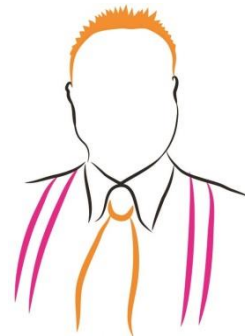
Resources

1. https://attendee.gotowebinar.com/recording/5011078477814407682
2. http://www.brainlink.com/2014/12/17/secret-to-brainlinks-success-process-and-sops/
3. http://www.brainlink.com/2015/04/24/the-joy-of-sops/
4. http://www.brainlink.com/about-us/media/how-to-build-excellent-standard-operating-procedures-that-will-drive-business-growth-mspradio-47/
5. http://www.brainlink.com/2015/05/30/the-joy-of-sops-2/
6. http://www.brainlink.com/2015/07/08/the-joy-of-sops-better-than-pizza-better-than-chocolate-better-than-sex-how-to-create-effective-sops/
7. http://www.brainlink.com/first-fridays-with-raj-2/
8. http://www.brainlink.com/2015/10/27/creating-obvious-sops/
9. http://www.brainlink.com/files/2014/02/SOP_Template.doc.docx

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Questions?

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Author of
UNPLUGGED Luddites Guide To Cybersecurity
http://www.amazon.com/UNPLUGGED-Luddites-Guide-CyberSecurity-Grandparents/dp/0984424830/

The Most Important Secrets To Getting Great Results From IT
http://www.amazon.com/gp/product/0984424814