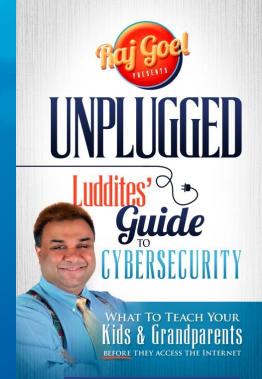
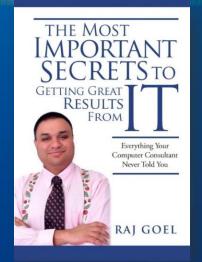
PROCESS • PEOPLE • PRODUCT •

ConnectWise Project Board Secret to KILLER Proposals and MASSIVE Profitability

Presented by:
Raj Goel, CISSP
Brainlink International, Inc.







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 and a 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, <u>WPIX11</u>, New York City (2013-present)
 - On-Air Cybersecurity Expert, Columbia News Tonight, <u>Columbia</u> <u>University</u>, NYC
 - Keynote speaker, NCSL 2013, <u>Government of Netherlands</u>, The Hague, Netherlands
 - Keynote speaker, Government Of Curacao, 2013

- Keynote speaker, "what should MSP's know about compliance", <u>Datto</u> partner conference, 2013
- Author, "Googling Your Privacy and Security Away", Infosecurity
 Professional Magazine
- Author, "Trends In Financial Crimes", <u>Infosecurity Professional Magazine</u>
- 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", <u>Infosecurity Professional Magazine</u>, 2015



Media Appearances





Global Business and Technology Association





The New York Times



(ISC)^{2*}
SECURITY TRANSCENDS TECHNOLOGY™

BrightTALK™























NATION POWER YOUR PROFITS

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
- Author, 2 books
- 2014 Top 7 finalist, TechnologyMarketingToolkit (Robin Robins)

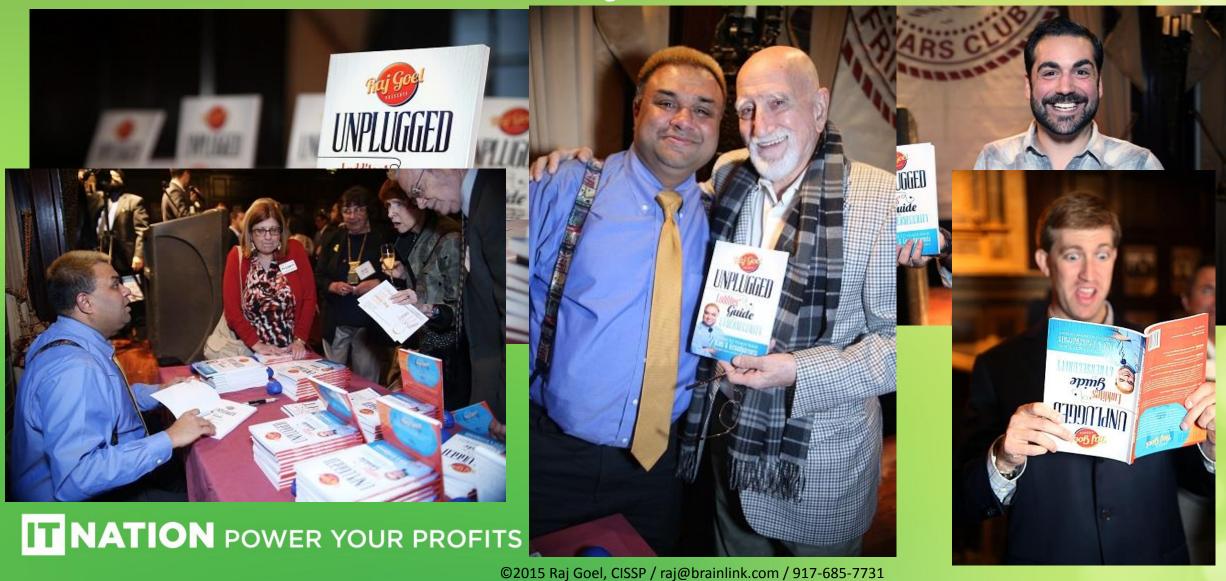
About BRAINLINK

- ✓ Founded in 1994
- ✓ Profiled in NYTimes, Entrepreneur, PBS, WPIX11, etc.
- ✓ Passionate about SOPs, SOTs, Process and Profitability
- ✓ Addicted to ConnectWise :-) (Thank you ARNIE!!!!)
- ✓ Award Winning MSP 2015 SmartCEO Magazine Winner for our

"SOP Culture"



Book 2 Launch Party!!



Why don't MSPs use Project Board?

- IGNORANCE In a survey of over 150 MSPs, only 20 knew about the Project Board
- LACK OF OPERATIONAL MATURITY Even the MSPs who know the Project Board exists, use it infrequently
- REACTIONARY Some MSPs use the Project Board to manage active, sold projects

Failing to use the Project Board means you are leaving \$\$\$ on the table!

Why Use Connectwise Project Board?

- Lets you plan the work
- Makes billing EASY
- Lowers operational costs for AYCE
- Increases revenues for projects



Challenge – WAGs suck

- Flat-fee projects were running at a loss
 - Exchange 2003-2010 Migration
 - Quoted/Billed for 30 hours
 - Spent 87 hours
 - Office Move
 - Quoted 50 hours
 - Spent 150 hours
 - Firewall Replacement
 - Quoted 20 hours
 - Spent 37 hours

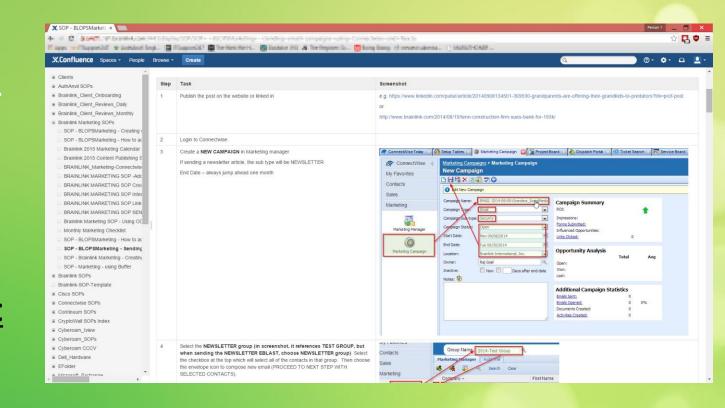


What's an SOP?

Standard Operating Procedure

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

No great brand thrives without building SOPs





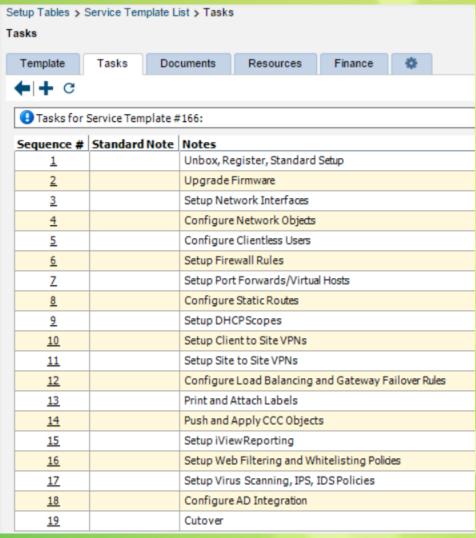
What's an SOT?

Standard Service Template

- A set of tasks and documents that can be attached to a ticket

Found under







What's A Project Template?

Did you create a project?

Want to re-use it?

Template it!!!

Project

Project Templates





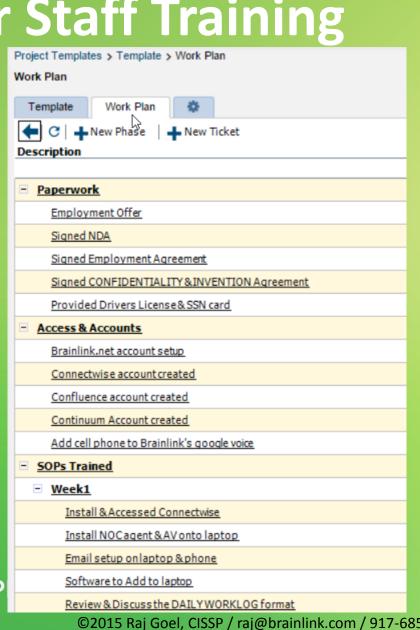
Standardize your Staff Training

We track everything from:

Day 1 paperwork (Employment Offer NDA, AUP, Direct Deposit)

All Accounts a tech needs (email, connectwise, SOP portal, etc)





= <u>50</u>	Ps Trained
= :	Week1
	Install & Accessed Connectwise
	Install NOCagent & AV onto laptop
	Email setup on laptop & phone
	Software to Add to laptop
	Review & Discuss the DAILY WORKLOG format
	Accessing the CONTINUUM A , Network , MCSA, MCSE training portal
	ConnectWise Training Completion
	Developing SOPS
	Creating configurations in Connedwise
	Creating an SOP and posting it to Connectwise
	Creating an SOT from SOP
	Daily Support/Ticket handling
	Perform DAILY BACKUP & IVIEW reviews
	Opening a NOC ticket to resolve backup issues
	Continuum Communicator Install
	Vipre / Managed AV dashboard
	Reflexion & GFI Spam filtering process
Ξ.	Week2
	Cyberoam Training Completion
	⊡ Week4
	Outlook SOPs
	Windows SOPs
	Exchange
	Network Detective
35-773	

AYCE Client Onboarding

Prior to

Service Order Templates (SOTs),

Standard Operating Procedures (SOPs) and Project Board:

20 hours per server (with errors)

Post SOP/SOT:

6 hours per server





Office Move Project

On time, Under Budget

Descri	74.00	12/12/2013	12/30/2013	52.50	11/11/2013	1/5/2014	66.50	ND
- Pre-Move	42.00	12/12/2013	12/26/2013	29.00	11/11/2013	12/27/2013	41.00	В
Generate IT room layout	8.00			0.00	11/11/2013	12/18/2013	7.25	В
Order firewall, recommend switches	4.00			0.00	12/12/2013	12/13/2013	3.75	В
Test Time Warner Cable Circuit	4.00	12/18/2013	12/18/2013	1.00	12/18/2013	12/18/2013	2.00	В
Setup NYC Cyberoam CR50 firewall	16.00	12/12/2013	12/18/2013	18.00	12/12/2013	12/27/2013	20.00	В
Setup Data Switches	8.00	12/19/2013	12/19/2013	8.00	12/18/2013	12/18/2013	3.00	В
Move Datto appliance to new site	2.00	12/26/2013	12/26/2013	2.00	12/26/2013	12/26/2013	1.50	В
General Server Room Setup	0.00			0.00	12/19/2013	12/26/2013	3.50	В
- Moving Day	24.00	12/27/2013	12/28/2013	19.50	12/26/2013	12/28/2013	25.00	В
Shutdown NYC servers & prep for move	4.00	12/27/2013	12/27/2013	4.00	12/26/2013	12/26/2013	2.50	В
Rackmount servers & vault in new office	4.00	12/27/2013	12/27/2013	4.00	12/26/2013	12/26/2013	3.50	В
Confirm domain connectivity to	8.00	12/27/2013	12/27/2013	4.00	12/26/2013	12/26/2013	1.50	В
Confirm Onsitebackups haveresumed	4.00	12/27/2013	12/27/2013	3.50	12/28/2013	12/28/2013	2.00	В
Confirm OFFSITE backups have resumed	4.00	12/28/2013	12/28/2013	4.00	12/28/2013	12/28/2013	4.00	В
12/27 Onsite support	0.00			0.00	12/27/2013	12/27/2013	11.50	В
Post-Move	8.00	12/30/2013	12/30/2013	4.00	12/30/2013	1/5/2014	0.50	В
Document any lingering issues and prioritize	8.00	12/30/2013	12/30/2013	4.00	12/30/2013	1/5/2014	0.50	В

Parallelize Efforts

2 techs worked from the Plan

Worked efficiently, without errors, on time, on budget

Description	70.00	1/2/2014	1/27/2014	0.00	12/17/2013	1/27/2014	70.00
□ Backups Upgrade	70.00			0.00	12/17/2013	1/27/2014	70.00
Purchase (1998)	1.00			0.00	12/31/2013	12/31/2013	1.00
Setup Carolina	30.00			0.00	12/17/2013	1/14/2014	30.00
Backup Backup	4.00			0.00	1/19/2014	1/20/2014	4.00
Backup	4.00			0.00	1/19/2014	1/20/2014	4.00
Backup A	4.00			0.00	1/19/2014	1/20/2014	4.00
Backup Backup	4.00			0.00	1/19/2014	1/20/2014	4.00
Backup A	4.00			0.00	1/19/2014	1/20/2014	4.00
Backup A 1997	4.00			0.00	1/19/2014	1/20/2014	4.00
Project Management	10.00			0.00	1/26/2014	1/26/2014	10.00
Post installation Review	5.00			0.00	1/27/2014	1/27/2014	5.00



Generate Proactive Budgets & Refresh Plans

Challenge – Client's under budget

Client's don't know how they should budget their IT spending. Let's help them!

Solution:

- Ask what their fiscal calendar looks like
- Spend a few hours generating a credible 2016/2017 Budget & Refresh Plan
- Define what known or potential BUSINESS problems you are resolving (no one cares about tech issues!)



Build Your PROJECT PLAN first!

Do your homework up front

				First	Last	Hrs	First	Last	Current
Project Totals	1	Closed	23.00	04/28/2014	07/18/2014	3.00	02/27/2014	12/13/2014	17.50
▼ □□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□	Phase 1	Closed	23.00	04/28/2014	07/18/2014	3.00	02/27/2014	12/13/2014	<u>17.50</u>
Hardware Investigation	17397	Completed	0.00			0.00	02/28/2014	02/28/2014	0.75
Purchase memory & SSD drives	<u>16781</u>	Completed	1.00			0.00	02/27/2014	02/27/2014	0.50
Upgrade 1 server	16782	Completed	20.00			0.00	03/28/2014	03/28/2014	4.50
Test SSDs	19522	Completed	2.00	04/28/2014	05/16/2014	2.00	04/24/2014	04/28/2014	1.50
Migrate Toperating System Drives from HDD to SSD	23264	Completed	0.00	07/18/2014	07/18/2014	1.00	12/12/2014	12/13/2014	10.25

Example 2014 budget

Dear CFO,

Here's what we should

spend in 2014.

- Raj

CLIENT PROJECTS LIST & BUDGET 2014 (T Operations Budget

			_	Unit	
QTY	2014 Description	Vendor	Туре	Cost	Total Cost
2	Dell Systems Servers (ESXi1, ESXi2)	Dell	2013СарБк		
1	Dell PS4000 San refurbished	eBay	2013Cap5x		
4	Samsung 1TB SSDs	Newegg	2013СарБх		
30	PS4000 Setup	Brainlink	2013OpEx		
20	ESXi1 Setup	Brainlink	2013OpEx		
20	ESXi2 Setup	Brainlink	2013OpEx		
40	Exchange 2007 Stabilization	Brainlink	2013OpEx		
2	VMWare aSphere Standard with aCenter	VMWare	2014СарБх		
1	MAINOFFICE CR50 Firewall	Cybernam	2014Cap5x		
30	CR50 Setup	Brainlink	20140pEx		
	TOTAL				

NYC Office Move Budget

100	NYC Office Move	Brainlink	NYCMOVE	
1	NYC CR50 Purchase	Cybernam	NYCMOVE	
2	APC SmartUPS	Amazon	NYCMOVE	
2	Dell 5448 Switch Purchases	Dell	NYCMOVE	
20	CR50 Setup	Brainlink	NYCMOVE	
	Total			

PROJECTS SCHEDULE - Q42013 - Q42014

- 1. Nov 2013 -
 - Buy 2 NEW ESXi servers,
 - b. Triage Office desktops and Laptops
 - c. Plan NYC Office Move
- Dec 2013
 - a. Setup the VMware farm in MAINOFFICE
 - b. Move EXCHANGE to VMware farm
 - c. NYC Office Move Setup Firewall & Router
 - d. Setup the MAINOFFICE Firewall
- 3. Q1 2014 ·
 - a. Buy VM ware licenses for ESXi01/02 from 2014 Budget
 - b. NYC Office Move Move & setup servers, desktops, etc.
 - c. Monitor Exchange07 performance
 - d. Train new CLIENT onsite tech in following and developing proper SOPs, Documentation, etc.
- Q2 2014 (optional, budget permitting)
 - a. Upgrade SERVERA
 - b. Move everyone from SERVERC to SERVERA, Retire SERVERA
- Q1 2015
 - a. Buy ESXi03, VM ware Licenses for ESXi03
 - b. Install ESXiO3
 - c. Plan EXCHANGE 2007 to 2010/2013 Migration
- 6. Q2 2015
 - a. Implement Exchange 2010/2013 migration
 - b. Purchase new switches
 - c. Replace Switches

Projects/Tasks Not Currently Budgeted for:

- A) NYC Office 2nd WAN
- B) Desktop and Laptop replacements
- C) Malware cleanup post WindowsXP end-of-life
- D) Standardizing job site firewalls, AV/AS
- E) Field Tablet evaluation
- F) BIMs Research and Implemetation
- G) Desktop monitoring and anti-virus management

Ohh...2015 budget

Here's some numbers to put in 2015 budget.

Ensures client doesn't under-budget 2015!

,	s Moved to 2015			
	Warranty Renewals			
	Dell Warranty Renewal for			
2	-PS01, PS02	Dell	2015CapEx	
	SERVERA Upgrade			
	SERVERA Upgrade			
1	48GB SERVERA Memory	Dell	2015Cap5x	
2	Samsung 1TB SSDs	Newegg	2015CapEx	
8	Upgrade SERVERA memory & disks	Brainlink	2015OpEx	
	3rd <u>ESXi</u> Server			
1	Dell Systems Servers (ESXi3)	Dell	2015Cap5x	
20	ESXi3 Setup	Brainlink	2015OpEx	
4	VMWare vSphere Standard with vCenter	VMWare	2015CapEx	
	Switch Replacements			
5	Dell 5448 Switch Purchases	Dell	2015Cap5x	
40	Switch Migration	Brainlink	2015OpEx	
	Exchange 2007 to Exchange 2013 Migration			
3	Windows 2012 Server Software	Microsoft	2015CapEx	
125	Windows 2012 CALS	Microsoft	2015Cap5x	
3	Exchange 2010/2013 Server Software	Microsoft	2015Cap5x	
125	Exchange Enterprise Cals.	Microsoft	2015Cap5x	





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/

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Questions?



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Contact Information

Raj Goel, CISSP

Chief Technology Officer

Brainlink International, Inc.

C: 917-685-7731

raj@brainlink.com

www.RajGoel.com

www.linkedin.com/in/rajgoel

@rajgoel_ny

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



