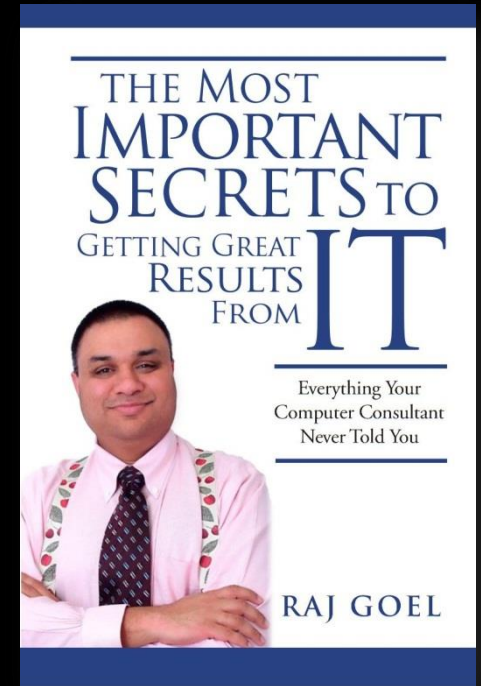# Increasing Revenue From Existing Clients WITHOUT Raising Rates
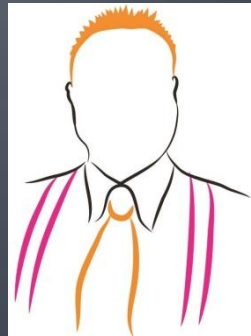
Raj Goel, CISSP

Connectwise Projectboard

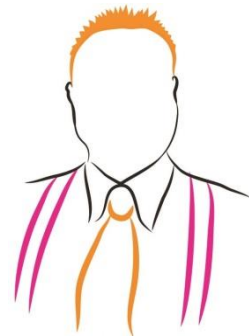Lets you plan the work

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

AYCE Client Onboarding

Description	74.50	11/1/2013	11/1/2013	4.00	10/28/2013	1/9/2014	81.18
− Network Discovery	42.50	11/1/2013	11/1/2013	4.00	10/28/2013	1/9/2014	36.40
Run NEWT Report	2.00			0.00	10/28/2013	10/28/2013	1.50
Gather ND Reports	4.00			0.00	10/28/2013	10/28/2013	2.00
Mount ▮▮ DATTO Appliance into the Rack	0.00			0.00	10/28/2013	10/28/2013	1.00
Setup ▮▮ NOC Portal	0.00			0.00	10/28/2013	10/28/2013	1.50
Change DOMAIN ADMIN & FIREWALL Passwords	1.00	11/1/2013	11/1/2013	1.00	11/1/2013	1/9/2014	1.00
Enroll ▮▮ Servers into Brainlink NOC	8.00	11/1/2013	11/1/2013	3.00	10/28/2013	1/9/2014	1.78
Enroll NYC Servers into Brainlink NOC	4.00			0.00			0.00
▮▮ Onboarding	1.50			0.00	11/1/2013	1/9/2014	2.25
▮▮ Onboarding	1.50			0.00	11/1/2013	11/4/2013	1.75
▮▮ Onboarding	1.50			0.00	11/1/2013	1/9/2014	3.00
▮▮ well Onboarding	1.50			0.00	11/1/2013	11/2/2013	5.00
▮▮ Onboarding	1.50			0.00	11/1/2013	1/9/2014	1.00
▮▮ Onboarding	1.50			0.00	11/1/2013	1/9/2014	1.00
▮▮ Server Onboarding	1.50			0.00	11/1/2013	11/2/2013	1.75
▮▮ Patches Status	0.00			0.00	11/2/2013	1/9/2014	0.57
▮▮ Onboarding	1.50			0.00	11/8/2013	11/8/2013	1.00
▮▮ DC01 Onboarding	1.50			0.00	11/8/2013	11/8/2013	1.75
Process for routing traffic from Lightpath to XO and...	0.00			0.00	11/2/2013	11/4/2013	0.27
Generate ▮▮ Documentation	10.00			0.00	10/28/2013	11/1/2013	7.00
Purpose of the RDP forwards in the ▮▮ rewall	0.00			0.00	11/2/2013	11/2/2013	0.03
AppRiver Account Migration	0.00			0.00	11/1/2013	11/4/2013	1.25
− ▮▮ Backups	24.00			0.00	11/8/2013	12/13/2013	21.00
Configure DATTO Device	4.00			0.00	11/25/2013	11/25/2013	7.00
▮▮ Backups Setup	4.00			0.00	11/26/2013	11/26/2013	2.00
▮▮ erver Backups Setup	4.00			0.00	11/8/2013	11/8/2013	2.00
▮▮ LL Server Backups Setup	4.00			0.00	11/26/2013	11/26/2013	2.00
▮▮ ver Backups Setup	4.00			0.00	11/26/2013	11/26/2013	2.00
▮▮ ver Backups Setup	4.00			0.00	12/13/2013	12/13/2013	2.00
▮▮ erver Backups Setup	0.00			0.00	12/13/2013	12/13/2013	2.00
▮▮ erver Backups Setup	0.00			0.00	12/13/2013	12/13/2013	2.00
− NYC Backups	8.00			0.00	11/8/2013	11/8/2013	4.00
Configure NYC Datto Device	4.00			0.00	11/8/2013	11/8/2013	2.00
▮▮ Server Backups Setup	4.00			0.00	11/8/2013	11/8/2013	2.00
− Post-onboarding	0.00			0.00	11/2/2013	1/9/2014	12.28
Disinfect ▮▮ Desktop	0.00			0.00	11/2/2013	11/2/2013	12.03
Project Review	0.00			0.00	1/9/2014	1/9/2014	0.25
− ▮▮ Onboarding	0.00			0.00	11/11/2013	1/9/2014	7.50
▮▮ iscovery	0.00			0.00	11/11/2013	11/18/2013	2.25
▮▮ PC Onboarding	0.00			0.00	11/11/2013	1/9/2014	5.25

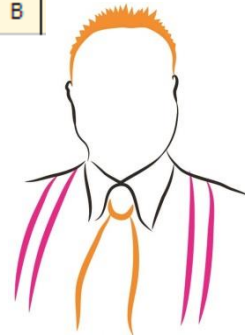Prior to Service Order Templates, SOPs and Project Board:
20 hours per server (with errors)

Post SOP/SOT:
6 hours per server
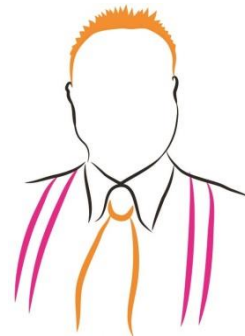
Office Move Project

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

On time, Under Budget

Parallelize Efforts

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 ▮▮▮▮▮▮	1.00			0.00	12/31/2013	12/31/2013	1.00
Setup ▮▮▮▮▮▮	30.00			0.00	12/17/2013	1/14/2014	30.00
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 ▮▮▮▮▮▮	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▮▮▮▮▮▮	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

2 techs worked from the Plan
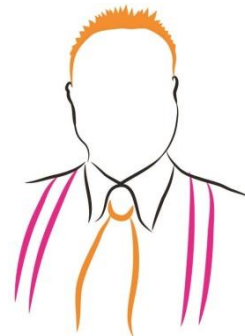Worked efficiently, without errors, on time, on budget

Parallelize Efforts

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 ████████	1.00			0.00	12/31/2013	12/31/2013	1.00
Setup ████████	30.00			0.00	12/17/2013	1/14/2014	30.00
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 ████████	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 ████████	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
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

2 techs worked from the Plan
Worked efficiently, without errors, on time, on budget

# Generate Proactive Budgets & Refresh Plans
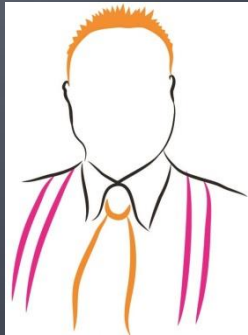
Challenge – Client's under budget

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 2014/2015 Budget & Refresh Plan
- Define what known or potential BUSINESS problems you are resolving (no one cares about tech issues!)
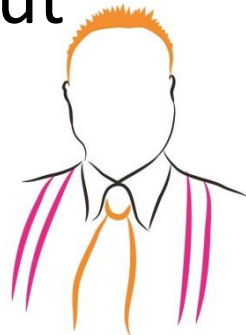
Example 2014 budget

1. Nov 2013 –
   a. Buy 2 NEW ESXi servers, ▮▮▮▮▮▮
   b. Triage ▮▮▮ Office desktops and Laptops
   c. Plan NYC Office Move

2. 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 VMware 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.

4. Q2 2014 (optional, budget permitting) –
   a. Upgrade SERVERA
   b. Move everyone from SERVERC to SERVERA, Retire SERVERA

5. Q1 2015 –
   a. Buy ESXi03, VMware Licenses for ESXi03
   b. Install ESXi03
   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

CLIENT PROJECTS LIST & BUDGET

2014 IT Operations Budget

QTY	2014 Description	Vendor	Type	Unit Cost	Total Cost
2	Dell Systems Servers (ESXi1, ESXi2)	Dell	2013CapEx		
1	Dell PS4000 San refurbished	eBay	2013CapEx		
4	Samsung 1TB SSDs	Newegg	2013CapEx		
30	PS4000 Setup	Brainlink	2013OpEx		
20	ESXi1 Setup	Brainlink	2013OpEx		
20	ESXi2 Setup	Brainlink	2013OpEx		
40	Exchange 2007 Stabilization	Brainlink	2013OpEx		
2	VMWare vSphere Standard with vCenter	VMWare	2014CapEx		
1	MAINOFFICE CR50 Firewall	Cyberoam	2014CapEx		
30	CR50 Setup	Brainlink	2014OpEx		
	TOTAL				

NYC Office Move Budget

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

FO,
what we should spend in
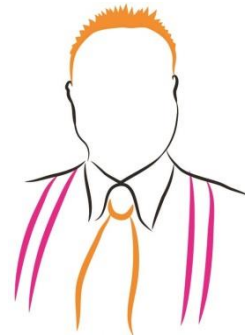
Ohh…2015 budget

Projects Moved to 2015

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

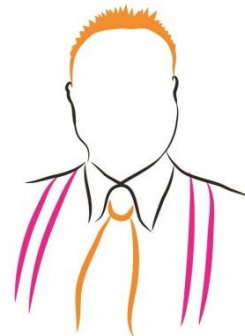**POTENTIAL 2015 PROJECTS**

SERVERA Upgrade

Exchange Migration from Exchange2007 to Exchange2010 or Exchange2013

▮ Virtualization
▮ Virtualization
▮2 retirement

▮ Virtualization
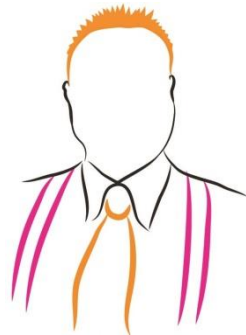▮001 Virtualization

MAINOFFICE Switch Replacements

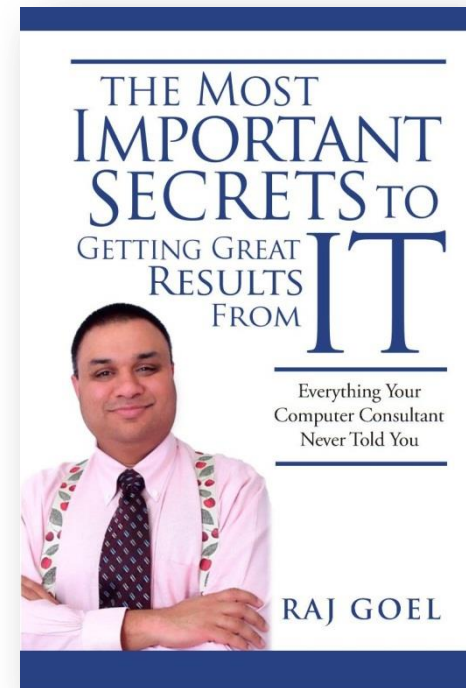Here's some numbers to put in 2015 budget. Ensures client doesn't under-budget 2015!

Resources

Bootcamp Bonus:
Sales Template

Sample REFRESH & BUDGET Plan
(you must signup by May 5th)

Contact Information

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http://www.amazon.com/gp/product/0984424814