**Case Study – IT BIZ SOLUTIONS**

IT Biz Solutions offers a wide range of Information and Communication Technology services to businesses of all sizes.

IT Biz Solutions has recently gained a new client, Paul Burns, who is the Principal Consultant of Grow Management Consultants.

Grow Management Consultants is a small consultancy company specialising in leadership development services. These include training for members of companies’ management teams and providing networking opportunities to managers from a wide variety of companies.

In accordance with IT Biz Solutions’ procedures for new clients, Paul has sent in Grow Management Consultants Company Information and the following email:

Dear IT Biz Solutions

I have been referred to IT Biz Solutions by a colleague who is a very satisfied client of yours.

Basically, we are looking for assistance in improving our company’s website. We have a basic website, but it is time to upgrade it. I have heard that this is one of your company’s areas of expertise, and I am looking forward to hearing what you propose for us.

Once we have the new site up and running, we intend to manage it ourselves. Our staff don’t have the expertise yet, but we are hoping they will learn to do this.

I also think that the efficiency of our electronic communication is not what it could be, which is a little concerning and I am wondering if this is an area where you provide services? Although we do a lot of our work with our clients face-to-face, I firmly believe that it is through electronic media that effective business relationships are maintained in the long term.

I would appreciate it if you could develop a draft proposal and send it to me as soon as possible. We will then make an appointment to discuss it. Please ensure that your proposal also includes **timelines**, so I can co-ordinate these with our company’s operations. We are very keen to get this project completed as soon as possible.

If you have any questions about my company’s needs and how your company can fulfil these, please do not hesitate to contact me.

Regards,

Paul Burns.

**Client Profile – Grow Management Consultants**

**Introduction and services**

Established in 2010, Grow Management Consultants specialises in providing services to companies that assist them to improve their employees’ leadership performance.

Grow Management Consultants draws on its up-to-date knowledge and skills in best practice leadership concepts to assist clients with leadership performance.

Grow Management Consultants are committed to promoting individual and organisational leadership excellence. We do this by providing:

* Mentoring training
* Coaching
* Management consultation
* Management program evaluation
* Development of cutting edge tools, resources and expert advice
* Sharing best and next practices
* Leading organisations through the process of creating a leadership culture
* Recognising and celebrating excellence in leadership.

**Values and culture**

Grow Management Consultants encourages and nurtures a culture that ensures that our team is dynamic and innovative and maintains the highest possible client service standards.

The core values underpinning all of our activities are:

* Quality
* Innovation
* Respect
* Reliability

Grow Management Consultants continues to build deeper customer relationships through:

* Customer-centred practice, with a focus on meeting their total needs for high-quality management
* Strengthen the skills of our people, to better support customers
* Drive innovation to better meet customer demands

**Service standards**

Our key service standards are:

* Respond to all enquiries within 3 working days.

Be friendly and professional at all time with all stakeholders

* Provide all agreed services to agreed timelines.

**Expansion Plans**

We plan to expand our client base by:

* Improving our marketing and advertising
* Continually improving the quality of service given to clients
* Maintaining effective communication channels with all stakeholders to ascertain industry requirements and then develop products and manage services accordingly
* Continually improving communication channels with all our stakeholders, ensuring a flow of timely and accurate information to facilitate effective planning and decision making
* Targeting identified growth markets with planned, market appropriate campaigns employing a variety of promotional strategies and advertising mediums
* Offering attractive fee structures to our clients
* Continually improving the skills, knowledge and effectiveness of Grow Management Consultants through our commitment to training and development
* Regularly reviewing the effectiveness of all our operations and making improvements when and where necessary

**Trends**

We know leadership skills are vital. See a recent report on this here:

<https://fbe.unimelb.edu.au/cwl/sal#about>

**Technology**

Grow Management Consultants uses the most up to date version of Microsoft Office for all documentation so that these can be used and modified by all clients.

**Service Level Agreements**

For online integrated accounting needs, we use Xero.

The company’s hardware is purchased and maintained through Office Galaxy, and a service level agreement is in place with them to keep all hardware purchased through them functioning and up to date. The Service Level Agreement will continue for another year, when it is due to be renewed or replaced.

**IT Biz Solutions Company Services Information**

IT Biz Solutions shows clients how to collaboratively transform information technology into business advantages.

We help to translate advanced technology into value for our clients through our range of professional services.

**Managed IT Services**

At IT Biz Solutions our Managed IT Services solves all of your technology issues so you can focus on running your business. We do this by giving you all the IT support you need, for a fixed monthly fee.

We are proactive with our support, offering efficient business solutions. We ensure that our clients always know what is planned and what is being implemented when, so there is minimal downtime and all issues are handled before they become problems.

Clients have direct access to our Senior Engineer, who knows how to fix things fast.

The IT Biz Solutions team becomes clients’ outsourced IT team. We continually monitor their system remotely, conducting backups and keeping them updated on what they need to know.

Our clients value not having to deal with IT issues anymore. We handle it all for them.

**Managed Continuity**

The IT Biz Solutions Managed Continuity service provides an affordable solution to a range of IT issues faced by businesses, such as:

* Data loss
* Fire or flood damage to IT equipment
* Theft of data, PCs or laptops
* Systems crashing
* Staff unable to work due to server issues
* Email not working
* Virus attacks
* No access to files

Managed continuity provides services which are all designed to protect clients’ business, save them money and help their business to grow.

This service includes training of staff in the new system.

**Managed Workstations**

The IT Biz Solutions Managed Workstations service keeps your PCs and laptops healthy, so you can concentrate on your business.

Advantages include:

* Reducing downtime
* Improving system performance
* Automatic installation of updates and upgrades

**Hardware Sales and Maintenance**

Instead of shopping for your company’s computers and information system hardware yourself, our clients can leave this to IT Biz Solutions. We know the industry very well, so we can get equipment at sale prices and make bulk purchases that attract generous discounts.

This service can also provide regular, guaranteed maintenance for all computers and information system hardware, whether it has been purchased through us or not.

**Managed Email Service**

The IT Biz Solutions Managed Email Service helps our clients to keep in constant contact with their customers, suppliers and contractors by email.

With Managed Email, we help you overcome common email issues in a cost-effective and efficient way:

* Virus threats
* Loss of emails
* Server downtime
* Lost email connection
* Junk mail filling your inbox
* Genuine emails getting blocked
* Running out of server space
* Unable to locate important emails

It takes about six weeks to set the system up as it involves research into the company’s current and future email usage as well as extensive programming. Once it is in place, however, it will function for the life of the company.

**Managed Security Services**

Every company’s confidential information should be comprehensively protected against hacker attacks.

The IT Biz Solutions Managed Security service protects clients’ data against internal and external breaches through a cost-effective, affordable solutions.

It helps keep clients safe from:

* Attacks on your email
* Data theft
* Virus attacks
* Unauthorised access to systems
* Downtime

This service takes about two months to put in place, depending on the size of the company’s data base, number of users and the complexity of jobs being performed.

**Digital Marketing Services**

IT Biz Solutions are committed to looking for ways to help our clients grow their business.

We do this by offering a full suite of digital marketing services that deliver specialist support to help our clients do business better in the digital age. We help with:

* Website design
* SEO
* Social Media
* E-marketing
* Strategy & Planning
* Content development
* Graphic Design
* Training

Website design

In this digital age, a company’s website should be at the centre of all the marketing that they do.

Every company absolutely needs a professional-looking website with great content that will inspire the viewer, with inbuilt systems that deliver new leads regularly.

Smart businesses understand the power of the passive income that an online shop can provide.

There are many reasons why a great website is a must for every competitive business:

* Every competitor has a website
* It gives access to millions of potential customers worldwide
* People will look online for products and services
* It helps to future-proof a business
* It represents affordable marketing
* It can be a platform for great advertising
* It provides passive income opportunities
* It is open 24/7
* Can improve customer service
* Provides a portal to share information about your business

Great websites do more than provide information: they can be a portal of communication between customers, employees, suppliers and consultants, and each of these can be maintained securely and personably.

This does not mean that all good websites are complex, but that complex websites offer a greater capacity for effective communication between all stakeholders.

Depending on the website’s complexity, it can take up to three months to set up. There should also be some ongoing website maintenance to ensure that the website is always up-to-date.

**Training**

IT Biz solutions can provide a wide range of training for clients’ staff.

Whether it be in website maintenance, email server configuration, or workplace set up, clients staff can be trained to take over these roles through planned courses that include theory and hands-on training.

**IT Biz Solutions Fee schedule**

For internal use only.

|  |  |
| --- | --- |
| **Fees** | **Details** |
| Managed IT Services | $500 per month |
| Managed Continuity | $750 per month |
| Managed Workstations | $150 per workstation per month |
| Hardware Sales and Maintenance | $200 per month |
| Managed Email Services | $1,600 set up and staff training |
|  | $200 per month |
| Managed security Services | $1,000 annual fee |
| Digital Marketing Services | $75 per hour |
| Simple website construction | $5,000 |
| Complex website construction | $10,000 |
| Website maintenance | $400 per month |
| Staff training | $75 per hour |

**Discounts**

Project Managers are able to offer up to 10% discount on total fees without pre-approval if BOTH of the following are satisfied:

* The business proposal fees total more than $10,000
* Closing the contract depends on a discount being given

**IT Biz Solutions Maintenance and Service Level Agreement**

1.1 Statement of Intent

The aim of this agreement is to provide a basis for close co-operation between [CLIENT NAME] and IT Biz Solutions, for support services to be provided by IT Biz Solutions to [CLIENT NAME], thereby ensuring a timely and efficient support service is available to [CLIENT NAME] end users. The objectives of this agreement are detailed in Section 1.2.

This agreement is contingent upon each party knowing and fulfilling their responsibilities and generating an environment conducive to the achievement and maintenance of targeted service levels.

1.2 Objectives of Service Level Agreements

To create an environment which is conducive to a co-operative relationship between IT Biz Solutions and [CLIENT NAME] to ensure the effective support of end users

To document the responsibilities of all parties taking part in the Agreement

To ensure that [CLIENT NAME] achieves the provision of a high quality of service for end users with the full support of IT Biz Solutions.

To define the commencement of the agreement, its initial term and the provision for reviews

To define in detail the service to be delivered by IT Biz Solutions and the level of service which can be expected by [CLIENT NAME], thereby reducing the risk of misunderstandings

To provide a common understanding of service requirements/capabilities and of the principals involved in the measurement of service levels

To provide for all parties to the Service Level Agreement a single, easily referenced document which caters for all objectives as listed above

1.3 Definitions

"Maintenance Service Fee" shall mean a rate paid by the Client for website maintenance and maintenance related support. This fee is paid monthly/yearly. The fee depends on the selection of the maintenance level upon application.

“Website Maintenance” shall mean basic website changes and additions and does not including Server-Side Scripting or Database modifications.

“Server-Side Script” shall mean a program that is processed on the server, before the information ever reaches the user’s computer. These programming languages include but are not limited to PHP, ASP and ASP.NET.

“Term" shall mean the initial (12) twelve-month term of Website Maintenance after election by Client.

"Renewal Term" shall mean any (12) twelve-month term of Website Maintenance services elected by Client subsequent to the Term.

“Software” shall mean any artwork, programs, procedures, rules, and any associated documentation pertaining to the operation of a website. For example, a website, Content Management System, 3rd party applications like Forums, Blogs etc.

1.4 Services

The following is a list of the agreed services to be provided by IT Biz Solutions to [CLIENT NAME] and the agreed fees for each:

1.5 Website Maintenance Agreement Term

The term of this agreement is a (12) twelve-month term. The renewal term will automatically start once the term has lapsed unless termination has been received.

1.6 Website Maintenance Agreement Termination

a. The term or renewal term can be terminated as per a 10-day cooling off period after the commencement or renewal date of the agreement. Notice of this termination must be made in writing.

b. If the Client terminates the agreement prematurely to its term, then any unpaid Maintenance Service Fee’s will be invoiced based on the longest serving level.

1.7 Amendments to Contract

The Level of your Website Maintenance Agreement can be modified by giving 30 days’ notice in writing.

1.8 Client Responsibilities

1.8.1 Obligations

The Client agrees to provide IT Biz Solutions with reasonable access to all necessary personnel to answer any questions about any problems reported by the Client regarding the Software. Client also agrees to promptly implement all updates provided by either a 3rd party or IT Biz Solutions, if requested.

When requested and necessary, the Client shall provide IT Biz Solutions in writing a reasonable description of the maintenance required along with any additional information or software required to complete the Website Maintenance.

1.8.2 Primary Contacts

The Client shall appoint one (1) individual within Client's organisation to serve as primary contact between the Client and IT Biz Solutions and to receive support through IT Biz Solutions’ telephone support centre. All of the Client's support enquiries shall be initiated through these contacts and logged internally.

1.8.3 Level of Effort

99% of the time IT Biz Solutions will start working on your Website Maintenance within three (3) working days of receiving the request.

1.8.4 Error Correction

Upon identification of any Website Maintenance error, the Client shall notify IT Biz Solutions of such error and shall provide IT Biz Solutions with a problem report and enough information to reproduce the error. IT Biz Solutions shall use its reasonable efforts to respond to problem reports.

IT Biz Solutions shall begin to correct any reproducible Website Maintenance errors in the Software attributable to OPTINFRA with the level of effort commensurate with the error within two (2) business days based on the severity of the errors. IT Biz Solutions shall not be responsible for correcting any errors not attributable to IT Biz Solutions.

1.8.5 Go Live Policy

No software, error correction or modification will go live on Fridays unless otherwise agreed upon. Support is limited over the weekend and this policy is designed to reduce the risk of critical errors over this period.

1.8.6 Increasing charges

The Company may increase the Annual Charge, Normal & Abnormal Hourly Charges as set out in this Agreement by giving 14 days’ prior written notice to take effect at the end of the notice period. In such an event, the Client may terminate this Agreement before the end of the said notice period by a written notice to the Company.

1.8.7 Representatives

[CLIENT NAME] and IT Biz Solutions nominate the following representatives responsible for the monitoring and maintenance of the service agreement:

[CLIENT NAME]:

IT Biz Solutions:

1.8.8 IT Biz Solutions Contact Information

Website Maintenance service is available from Monday to Friday.

Address: 159 Farr St, Rockdale, NSW-2216, Australia

Tel: +61 02 425217587

Email: support@itbizsolutions.com.au

Web: www.itbizsolutions.com.au

2.0 Acceptance of Agreement

I have read and agreed to the above IT Biz Solutions’ Terms and Conditions and Website Maintenance Service Agreement.

Client’s Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of IT Biz Solutions’ Representative: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**IT Biz Solutions Customer Service Policy and Procedures**

**Policy**

All members of staff provide services to customers either directly or indirectly and must meet the needs of customers in a professional and ethical manner with courteous and efficient service.

IT Biz Solutions is committed to:

* Politeness: the use of good manners in all interactions
* Responsiveness: meet agreed timeframes and follow up on all queries
* Professionalism: being objective and knowledgeable and demonstrating integrity
* Understanding: customers and their business needs
* Confidentiality: respecting the confidentiality of customer information
* Transparency: processes are clear, consistent, easy to access and documented.

**General Principles**

Staff will:

* be aware that they are, at all times, acting as representatives of IT Biz Solutions: how they behave is how IT Biz Solutions is perceived. Positive relationships with customers, the public, and with other staff represent the positive relationship that IT Biz Solutions has with the community
* demonstrate to the customer at all times respect, courtesy, patience, attentiveness, consideration and sensitivity that is appropriate to the age, culture and linguistic background of the individual or group
* listen to what customers have to say and determine the exact nature of the request
* respond to customer enquiries promptly and efficiently in a timely manner
* act with integrity and honesty when dealing with customers
* make every effort to meet customers with appointments on time and advise if delayed
* assist with further enquiries. A contact name, telephone number and an address are to be included in all written correspondence
* if unavailable or away from the office, return email messages promptly upon returning
* if away from the office for two or more days an “out of office” message is to be left on outlook and the telephone
* provide the customer with advice and other information that is accurate, clear, concise, reliable and in plain language
* take appropriate action and respond in accordance with organisational policies and procedures with minimal inconvenience to the customer
* adopt fair, lawful and appropriate procedures when making decisions, carrying out activities and performing services
* be sensitive to any language or other communication difficulties experienced by customers when providing advice and other information
* be sensitive to any customers with disabilities when providing advice and other information

**Managing Telephone Enquiries**

The following procedure should be followed for telephone enquiries:

* Answer the phone in a timely manner. All telephone calls should be answered on or before the third ring
* Greet the client with “Good morning or good afternoon,” and then introduce yourself
* Be warm and friendly
* Speak slowly and clearly
* Be careful with language: slang or jargon is not to be used
* Be positive and helpful: if you don’t know the answer say that you will find out the answer and get back to the customer via telephone or email with the answer
* Give clear advice to the caller about when the caller can expect a response when calls cannot be fully responded to immediately. This should be within one business day.
* Deal with customers calmly, courteously and patiently, even when the callers are angry, aggressive or distressed. Remain polite and seek help if necessary
* Answer unattended telephones in the absence of colleagues whenever practical
* Respond to telephone messages within one business day whenever practical
* Change voicemail message(s) when absent from the office for any period of time, for example, external all-day meeting, state or territory based public holiday or on leave.

**Managing Written Enquiries**

All written communication will be clear and concise and adopt a formal tone.

IT Biz Solutions endeavours to acknowledge receipt of written correspondence:

* email within one working day
* mail within three working days

Where IT Biz Solutions is writing to a customer in response to an enquiry or other matter, all written correspondence must be finalised in the timelines shown above.

The email checklist must be reviewed and used to develop all email correspondence.

**Emails**

Subject field of email is clear and concise. Do not capitalise all letters.

Relevant recipients identified.

Email includes greeting and name and position.

Email body concise and to the point.

Email checked for spelling and tone before sending.

Tone should be warm.

**Business Proposal development**

The Proposal Template should be used for all formal business proposals.

After discussing this with the prospective client, and the client’s agreement has been obtained, a Service Level Agreement should be prepared using the Service Level Agreement (SLA) Template.

Any changes to the terms of the agreement should be documented in an updated version of both the SLA and the proposal.

**Dealing with difficult customers**

IT Biz Solutions staff are expected to treat customers with courtesy and respect at all times and to make every reasonable effort to address the customer’s needs even when the customer is rude or difficult.

Staff must try and put themselves in the customer’s shoes and be empathetic.

Actively listen to what the customer is saying and repeat their concerns to make sure you are addressing the right issue.

Use calm, objective wording e.g. ‘I understand you are quite rightly upset because your book did not arrive in the time we specified.’

Apologise to the customer and present a solution. For example, you could offer a discount on a future service.

All feedback should be recorded.

Where the customer indicates they wish to lodge a formal complaint, outline the complaint procedure as in the company’s complaints handling policy.

**Confidentiality and privacy**

IT Biz Solutions is committed to the protection of customer personal information. All dealings with customers must abide by the Privacy Act 1998 and the Australian Privacy Principles contained in the Privacy Act 1998 (CTH) except when qualified by any relevant Codes of Practice and will underpin all matters related to personal information at IT Biz Solutions.

**Complaints and Feedback**

IT Biz Solutions welcomes complaints from customers. If a customer wishes to make a complaint, they may contact us via email or via phone to discuss their complaint. Where the complaint cannot be resolved at this first point of contact, the complaint will be referred to the management team. The customer will be contacted within three (3) working days to advise of the outcome of their complaints.

IT Biz Solutions also welcomes feedback from all of its customers and sends a link to an online survey for all customers to complete.

**Case Study – IT BIZ SOLUTIONS – Project Progress**

Work began on the project two weeks ago.

As part of IT Biz Solutions’ standard project management procedures, you have received the following emails from the project’s team leaders:

Dear Project Manager.

The website is progressing well. The home page has received approval, and our current focus is on collating the information and images that are needed for the rest of the website. We are on schedule to finish the project on time.

The company management appointed several Administration Assistants to assist us in collecting the information that we need, and they have done this very well. They are a busy team, but well organised.

I have held the second hour-long training session for these staff, as they have been appointed to maintain the website after it has been set up. Although they are certainly capable of performing these functions, I am not sure that the expectation will be fulfilled. Namely, the staff are already working at capacity, and seem to resent this extra work being put on them. It appears as though their administrative tasks are many and varied, and they much prefer the more customer-contact work that they otherwise undertake.

But, as I stated earlier, they have been very helpful with information collection, and they are very much behind the work that we are doing here. It just appears as though website maintenance is outside what they can manage now.

If you have any questions about this, please don’t hesitate to contact me.

Regards,

Website Team Leader.

Dear Project Manager.

The Managed Email Services project for Grow Management Consultants is progressing well. We have been able to use some of the work that we did for the business consultancy firm we worked with last year, so we are ahead of schedule. The new system should be ready to show to the company’s management in about two weeks.

Regards,

Email Services Team Leader.

Client Feedback

As part of standard procedures, a survey has been administered. The results are as follows:

Are you satisfied with our service? Client Response – Very Satisfied

How would you rate the quality of our service? Client Response – Very good

How responsive have we been to your questions or issues Client Response – Very responsive

How would you rate the support you have received Client Response – Very good

How likely would you be to recommend our services to others – Very Likely

**Case Study – IT BIZ SOLUTIONS – Information following project progress report**

Dear Project Manager.

Thank you for your progress report.

I am pleased that the project is progressing as expected. My whole team is looking forward to the new website and the new email services.

I have also received internal reports from our Administrations Assistants about their issues with the website maintenance. I understand that they are currently under a lot of pressure: we have several large congresses coming up soon, and we have taken on three new clients in the last two weeks.

I suggest that we abandon the idea of training up the Administrations Assistants to maintain the website. I would prefer that IT Biz Solutions does this for the next six months at least, and we can re-assess the situation then. If our new website generates even more business, we will have to hire more Administrations Assistants in the near future, and we could look at including website maintenance in their job description and training them up to do the job.

I would appreciate it if you would adjust your proposal and the Service Level Agreement to reflect these changes. Include the costing for website maintenance for six months, and we can re-assess it then. Please also include the cost of the staff training sessions that have already been carried out.

Thank you for all your work,

Paul Burns.