



TruMethods **FRAME WORK**

TRACK 2

PACKAGING AND PRICING

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STEP 2 | Defining Your Edges

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INTRODUCTION

In service-based businesses, defining what you offer to your clients is essential. One way to do this is by "defining the edges" within your packaging and pricing. Doing so can avoid ambiguity or confusion about what services to include in your monthly fee and set clear expectations for your clients.

Defining edges delivers clear and effective services to clients. It represents the boundaries of included services and what clients can expect from your MSP. In the following sections, we will delve deeper into defining edges and explore key considerations that MSPs must keep in mind when providing transparent and effective services to their clients.

The first section focuses on keeping things simple when defining edges. We will discuss the importance of clear and concise communication with clients, so they can understand the services offered without requiring detailed knowledge of the service contract or IT-specific terms. We will also explore the critical questions you should ask yourself when defining edges, such as what's included, what isn't and what the end result for the client's business will be. By answering these questions, you can ensure your service offerings are well-defined and easily understood by your clients.

In the following section, we will examine typical fuzzy edges that MSPs may encounter when defining their service offerings, such as determining the scope of support for third-party applications or the extent of support for moves, adds and changes (MACs).

We will explore how to clarify these fuzzy edges so that clients can clearly understand what services they will receive and what to expect from your MSP. Addressing these fuzzy edges prevents misunderstandings, reduces the likelihood of client complaints and provides a better service overall.



WHAT ARE EDGES?

In general terms, defining edges refers to establishing clear boundaries around the services that your MSP provides to clients. It involves specifying the scope of services and limitations or exclusions that may apply.

Defining edges is integral to developing a successful MSP service offering because it establishes clear client expectations and ensures that both parties understand what is included (and what is not). This can help to prevent misunderstandings, disputes and other issues in the future.

EXAMPLES OF EDGES IN A SERVICE OFFERING MAY INCLUDE:

- » The types of devices or systems your MSP supports (e.g., desktops, laptops, servers, network infrastructure)
- » The hours of availability for support services (e.g., 24/7, business hours only)
- » The types of support services included (e.g., remote monitoring, troubleshooting, maintenance)
- » Limitations or exclusions on the services provided (e.g., certain types of software or hardware, certain kinds of issues not covered)

EDGES WITHIN DELIVERY AREAS

You will find it essential to have clearly defined edges for each delivery area, which you and your clients understand well. By taking a closer look at each delivery area individually, you can gain valuable insights into how to define your edges and develop a service offering that is comprehensive and tailored to your clients' needs.

CENTRALIZED SERVICES

Centralized Services is the cornerstone of most MSPs and is responsible for delivering centralized IT services in one location or data center. These services provide a wide range of tools and solutions that MSPs use to manage their clients' IT infrastructure.

WHAT TOOLS ARE INCLUDED?

Examples of tools included are Remote Monitoring and Management (RMM), backup and disaster recovery solutions, antivirus software and cloud services.

WHAT PROCESSES ARE AUTOMATED?

Examples of automated processes include using RMM tools to monitor clients' devices and networks, automated patching to apply software updates and security patches and automated maintenance processes, such as disk cleanup, to improve device performance. Automating these processes helps MSPs identify and resolve issues quickly, keeping their clients' IT infrastructure running smoothly.

WHAT TYPES OF DEVICES ARE SUPPORTED?

Support is often provided for many devices, including desktops, servers, phones, tablets and BYOD devices. Establishing precise edges on what and how to support these devices would be best.



TECHNOLOGY ALIGNMENT

The technology alignment delivery area deals with how the MSP ensures that its clients' technology aligns with their business goals. To define the edges of this delivery area, the MSP should consider the following:

HOW WILL YOU STANDARDIZE YOUR CLIENT ENVIRONMENTS?

You must decide whether to standardize client environments initially or bill for moves, adds or changes. If you choose to standardize the environment, have a process to ensure that it is done consistently across all clients. If you bill for moves, adds or changes, communicate this to clients and have a process to manage the billing.

WHAT ARE YOUR BEST PRACTICES?

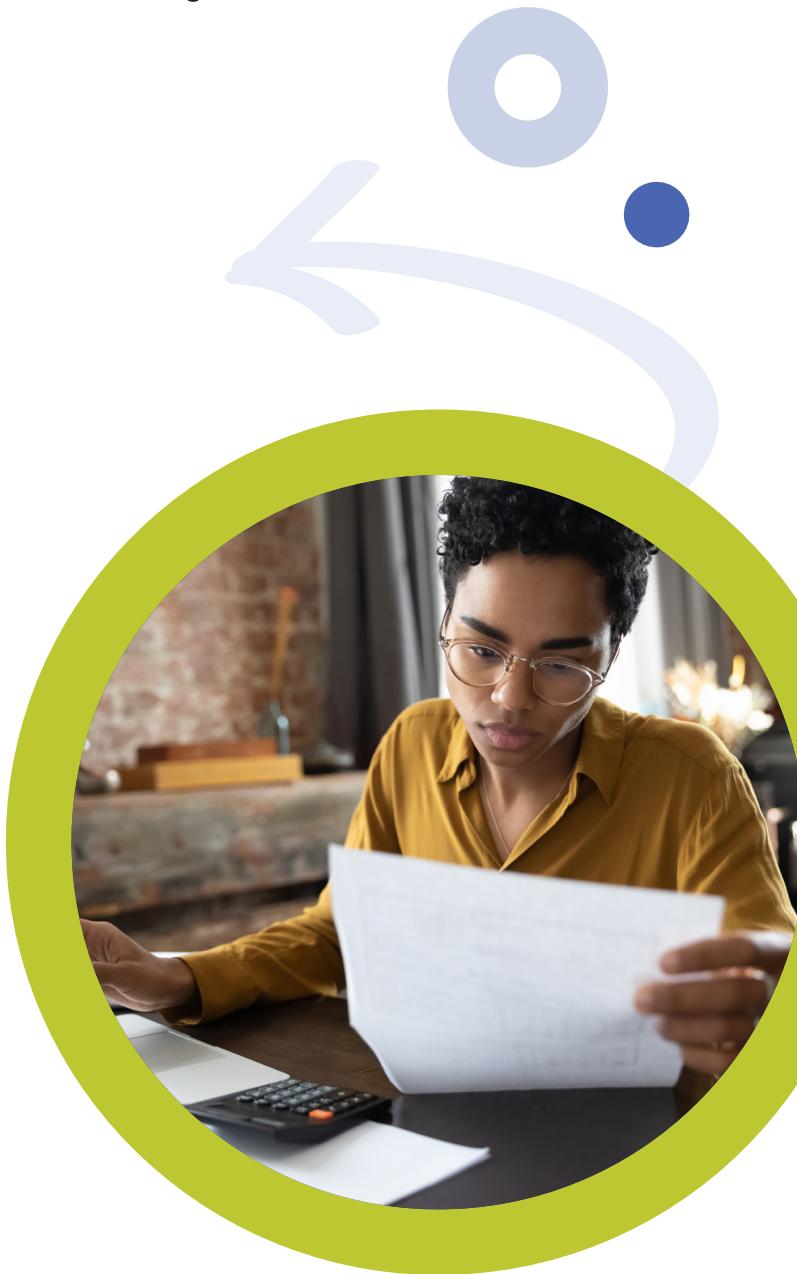
You should expect your MSP to have standards and best practices that you follow to ensure your customer's technology aligns with their business goals. You should communicate these standards to them and have a process to evaluate them for effectiveness regularly.

WILL YOU SCHEDULE TIME FOR PROACTIVE SERVICE?

You should schedule time for proactive service to ensure your clients' technology remains aligned with their business goals. It can include time for onsite or remote alignment reviews, and you should determine the frequency of these reviews and communicate it to your clients.

WILL YOU ASSIGN TECHNOLOGY ALIGNMENT MANAGERS TO CLIENTS?

It would help if you decided whether a dedicated role is assigned to clients or whether there will be a rotating team. If you decide on a dedicated team, make sure they are familiar with the clients' technology and business goals. Should you choose to have a rotating team, ensure that there is a process to brief new team members on the clients' technology and business goals.



VIRTUAL CIO

HOW MUCH CONSULTING WILL YOU INCLUDE?

The amount of consulting provided by the MSP should be clearly defined and communicated to the client, outlining whether the MSP will provide guidance or always be involved in technology decisions.

WHO WILL PROVIDE THIS SERVICE?

The vCIO responsible for providing consulting services should be identified, along with their qualifications and experience in the field.

HOW WILL YOU PRESENT THE VALUE PROPOSITION?

Present the value proposition of vCIO services to the client, including the specific deliverables they will receive, to know they are getting exemplary service.

BE SURE TO DISTINGUISH BETWEEN THE PLANNING AND IMPLEMENTATION OF A SOLUTION.

Make a clear distinction between the planning and implementation of a solution, and clarify whether the vCIO will be involved in the planning, implementation or both. Additionally, make it clear whether you include implementation in the service or if it will require an additional fee.

SUPPORT

SERVICE DESK

Is support unlimited?

- » Unlimited support typically means no limit to the number of tickets submitted. However, there may be limits on the amount of time spent on each ticket.

Can everyone call, or only points of contact?

- » Clients may want to know who is allowed to call the service desk and whether end users or just points of contact can submit tickets.

Can clients ask "how to" questions or only submit tickets for issues?

- » Some MSPs may only provide support for issues, while others may also handle "how to" questions.

What about third-party application support? Is that covered?

- » Third-party application support may or may not be included in the service agreement, and clients should clarify this with the MSP before signing a contract.

Are moves, adds and changes included?

- » Moves, adds and changes (MACs) may or may not be included in the service agreement, and clients should ask whether these will be performed by the MSP or billed separately.

What about escalations?

- » Clients should know how escalations are handled and who is responsible for resolving tickets that the first point of contact cannot fix.

What are your hours of support?

- » The support hours are essential to ensure that the MSP is available when needed, and clients should know about any after-hours or emergency support provided.

How will clients interact with your team?

- » Clients should clarify how they will interact with the MSP's service desk, whether through a self-service portal, phone support or both.

ONSITE SUPPORT

Is unlimited onsite support included, or is it billable?

- » Clients should know whether unlimited onsite support is included or billable, as well as what constitutes an "onsite" visit (e.g., distance, time).

Who decides when you go onsite, the MSP or the customer?

- » Knowing who decides when onsite support is necessary and whether the customer can request it or if the MSP must initiate it is essential.

How do you define the edges for reactive support covered under the agreement?

- » Clients should ask the MSP to clarify what constitutes reactive support covered under the service agreement as opposed to issues requiring additional billing.

PROFESSIONAL SERVICES

Professional Services refers to any additional services that the MSP may offer beyond the scope of their regular services, such as project management, consulting or implementations.

Are moves, adds and changes included?

- » If the MSP offers MAC services, it's essential to clarify whether they are included in the service agreement or billed separately. If billed independently, it is necessary to understand the pricing structure and the costs associated with MAC services.
- » Additionally, if there is a limit on the number of MACs included in the service agreement, it is important to understand what happens when they exceed that limit. Will additional MACs be billed at an hourly rate, or will a new service agreement need to be negotiated?

DEFINING YOUR EDGES

When considering the definition of edges, ask yourself:

ARE OUR EDGES EASY TO UNDERSTAND WITHOUT DETAILED KNOWLEDGE OF YOUR CONTRACT?

It is best to confirm that the scope of services provided by your MSP is clearly defined and easy to understand. Explaining it can prevent misunderstandings or disagreements and make it easier for clients to decide what services they need.

CAN CLIENTS UNDERSTAND OUR SERVICE WITHOUT KNOWLEDGE OF IT-SPECIFIC TERMS?

Clients may not have a technical background, so it's important to use clear and easy-to-understand language. Avoid technical jargon and use plain language to describe your services so that clients can make informed decisions.

DOES OUR OFFERING DIVIDE UP SUPPORT AREAS LOGICALLY?

It is invaluable to affirm that your offering is logically structured and easy to navigate so that clients can quickly find the information they need. Consider organizing your services by functional areas, such as networking, security and software, and provide precise descriptions of what to include in each area.



IS IT SIMPLE FOR END USERS AND SUPPORT STAFF TO UNDERSTAND?

Your service offering should be easy for end users and support staff to understand. It can help guarantee that everyone is on the same page and knows what to expect. Provide clear documentation and training materials, and make sure that your support staff is familiar with your service offering.

CAN I EXPLAIN OUR UNIQUE END RESULT QUICKLY AND EASILY?

Be able to describe the unique value that your MSP offers in a way that is simple and easy to understand. It will differentiate you from competitors and make it easier for clients to see the benefits of working with your MSP.

THREE SIMPLE QUESTIONS

Asking three simple questions can keep your MSP service delivery edges simple and easy to understand:

- 1. What is included?**
- 2. What is not included?**
- 3. What is the end result for your client's business?**

Clearly define what services are included and excluded in the service agreement to avoid confusion and communicate how the services provided benefit the client's business and how it aligns with their goals.

There is no single correct answer: Your MSP should tailor its services to each client's needs rather than using a one-size-fits-all approach. Work with clients to find solutions that fit their business needs and budget.

COMMON FUZZY EDGES

There are common fuzzy edges that can confuse your MSP and your clients. These fuzzy edges often arise from the lack of clarity on the scope of services, support areas and service levels, leading to misunderstandings, disagreements and dissatisfaction. To mitigate these risks, your MSP should clearly define the edges of your service offering so both parties understand what is included and what is not.

UNLIMITED (REMOTE OR ONSITE) SUPPORT

Clarifying whether support is unlimited and available remotely or onsite is imperative since it can affect the level of service provided to clients.

HOURS OF SUPPORT

Defining the hours of support the MSP provides can significantly affect client expectations and the MSP's responsiveness to issues.

THIRD-PARTY APPLICATIONS

You must clarify whether you provide support for third-party applications or only for those included in the service agreement since this can affect the level of support offered to clients.

MOVES, ADDS, CHANGES (MACS)

It is required to determine whether to include moves, adds and changes (MACs) or bill for them since this can significantly affect the cost of the service and the level of support available to clients.

"HOW TO" QUESTIONS AND TRAINING

Determining whether the MSP allows clients to ask "how to" questions and training – in addition to submitting tickets for issues – can impact the quality of service and overall client satisfaction.

SUMMARY

Defining your edges is critical to establish clear service expectations for your clients. To do so, examine your offering and delivery areas to identify and clarify fuzzy edges that may impact your service level. By doing this, you can guarantee that clients fully understand what is and isn't included in your service and that you can provide high-quality, consistent support.





NEXT STEPS

Continue your journey towards “world class” and check out more resources to help you along the way.

STEP 1 | Packaging Your Service Offering



STEP 2 | Defining Your Edges

STEP 3 | Pricing Your Service Offering

STEP 4 | Packaging & Pricing Workshop

STEP 5 | MSP Agreements

STEP 6 | Micro Picanomics

STEP 7 | Macro Picanomics

STEP 8 | Understanding Picanomics

If you have any questions about what you've read here, please contact your Channel Enablement Manager (CEM) for more information about the TruMethods Framework.



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