What is the product?

-              What are all the products you’re offering?

-              What problems does your product solve?

-              What are the competitors doing, and where do you win?

-              What are the client’s pain points that cause them to use your service?

-              What is the scope of your offering?

-              How do you save businesses money?

-              What does the ballpark pricing look like?

-              How do you structure contracts? (time, by seat?, etc)

-              Do you have an onsite offering still, or doing less of that?

-              Who is your target ideal customer? And ideally what are you trying to sell them?

-              What is PCIO’s bandwidth? How big is too big, how small is too small

-              Who are the decisionmakers making these decisions?

-              What are their titles?

-              What kind of businesses are these that you’re serving?

-              Who do you not want to serve?

-              Who wastes your time?

-              What are your geographic limitations for customers?

**What are all the products you’re offering?**

A highlight of the services:

* + End-user support services for PCs, Macs, Networks, Servers
  + Onboarding / offboarding of employees
  + Purchasing support & advice
  + Fleet management
  + Security and risk analysis
  + Concierge Helpdesk for businesses
  + Azure management
  + Office 365 billing/management
  + VOIP (telephone) management

The base software products we bundle with our services are:

* 1. Workstation management agent
  2. MDM (mobile device management) software
  3. Antivirus and Antimalware software
  4. Proactive DNS (antiransomware) software

The combination of the software products above, with the services listed above, are what we call our product, “TSP”, and we sell that “product” for $89/seat.

Our sweet spot of client is between 12 and 100 seats, which is a minimum of $1k/mo MRR for 12 seats. This is not exclusive as we have many smaller, and we’ve had a couple 300-600+ clients.

Secondary IT products we add where appropriate:

1. Security audit and remediation plans
2. Workstation backups
3. SaaS Backups (backups for software as a service environments such as MS365 or Google Suite)
4. Onsite BCDR (Business Continuity and Disaster Recovery)
5. Anti-phish training and monthly anti-phish testing
6. Password management
7. Dark Web scanning

**What are our competitors doing, and where do you win?**

* First, I don’t know of any IT companies around here that are like us, and we have no direct “named” competitors in our area. There are a few general MSP IT shops around here that are heavier staffed, “full service” IT companies that still send people onsite and try to be one-stop shops. (MSP is the catch-all label meaning ‘managed services provider’)
* There are a few companies I’ve read about (web searches) that offer only business Helpdesk, focusing on a specific niche as we have, but there aren’t that many of us.
* Some firms will only do Helpdesk services for other IT companies. So, instead of charging $89/seat, you take on the seats of other IT companies and do it for $20-$35/seat, but you get a lot of seats all at once as you add clients. However leveraged that may be, there are a lot of technical factors and management involved in doing that type of Helpdesk work that we’re not really geared up for (or particularly interested in doing.) So, B2B Helpdesk is our niche, not B2IT2B Helpdesk.

1. As most of our competitors concentrate on being “full service” IT, they usually charge more, and include unlimited onsite visits, and more “well baby” drop-by checks (say $150-175/endpoint, 250-350 per server.) There’s a lot of marketing and shmoozing that goes with those higher prices, and one reason we don’t is that I am the sole schmoozer, and not terrific at it. Our model is that of a helpdesk with management controls in place, where we work with Finance and HR to ensure the fleet is managed, the company is kept safe, and their financial exposure is kept to a reasonable standard. Our helpdesk model is based on an $89/seat.
2. Some clients are completely helpless and won’t do anything for themselves, which makes them very needy and kind of a pain. They refuse to do even the basics of helping to troubleshoot their issue, so they are hard to remotely support and not sophisticated enough for our model. Our model requires a modicum of partnership, and if you have a client who won’t participate for whatever reason, it is not going to work well. If I have a prospect who needs that high-touch model and doesn’t have the right staffing to partner with us, I’ll refer them to a local company (friendly competitor) who has a roving truck and makes house calls, because I know they’ll be happier than dealing with us.
3. Our current primary competitor is the small (but bigger than us – 15-20 people) IT shop who’s got their act together better, is more in the mainstream of current buzzwords and lingo, writes articles, chats people up, and you could play buzzword bingo if you eavesdropped on them.
   1. I think they win because they have a better overall sales message and communicates it better, via p2p, or LinkedIn, or regular email blasts, or their website. Buzzwords or not, they do a better job of spreading their message and making connections.
      1. They don’t win because they manage or protect people *better* than we do. They win because they *communicate* better. This is a recurring theme in clients we have lost over the years (which is not all that many,) in that we don’t lose because we sucked, we lost them because there were unmanaged expectations or some event where the folklore got out of control, and right or wrong you will lose if you lose control of the narrative. Sometimes there is nothing you can do about that, but if you’re reaching out and touching the clients one way or another on a regular basis it happens less. We just lost a client in Portland that I think we would have lost anyway, because the lady is out-of-her-mind-too-busy and pulled in too many directions, and wasn’t available enough to communicate with for her requests, much less “hey how are we doing” calls. Someone got in her ear, and she was convinced they’d be oh-so-much-better-off if they switched to this big chain of IT shops. The truth is that no, they probably won’t, and they’ll figure that out at some point, but someone got in her ear and I didn’t have a channel to head it off. Losing one like this is annoying, and unusual.
4. We win……
   1. In busy companies, growing companies and their technology getting out of hand. Where for instance, they’ve had turnover in their young company and they’re not getting any of their shiny MacBooks returned back to them because their young employees take them as parting gifts when they terminate and nobody is in charge of managing the asset. The company doesn’t have any fleet management or MDM in place, so the people just walk away with the new machine and there is nothing they can do about it short of guilting them (doesn’t work,) or calling a lawyer (not feesible.)
   2. Where the company is busy and has a lot of need produced by the churn of their on/offboarding.
   3. We are good at helping when we can work directly with the senior leadership of a client and can demonstrate the value of renting an entire IT >team< with ~100 years of IT experience across all disciplines for $89/seat. When we can demonstrate the benefit to them of our security approach and having enforceable asset management the ROI is highly attractive. But you have to have someone who A) respects the current security environment, B) respects the $cost in $ and intellectual property access of having their computers walk away, and C) is smart enough to see the cost-benefit of outsourcing this particular aspect of their technology to someone who knows how to do it well.
      1. A typical in-house IT FTE is minimum $65-85K/year, plus benefits, and they have to be pretty young to be brought in at that price. There is no way they have the depth of experience to across so many technologies, so you are getting a glorified desktop support tech, and who is overwhelmed by the bigger decisions, clueless how to manage it all because they’re junior. Usually we enter after these situations have gotten out of control, and we’re brought in to take over of the base-level support so that they can take that junior person and train them with higher-level IT skills – databases, software development, project management, etc.
   4. We have a very poor track record when we are relegated to work with a lower level of the company, insulated from the decision-making process, and where some manager is supposed to carry our message up to the exec management. This never worksd, and is something I now don’t let happen.

**What are the client’s pain points that cause them to use your service?**

1. When there is widespread internal frustration at the overall state of things, i.e., things aren’t working well and everyone knows it but can’t put their finger on the “why,” which is usually that there is zero management or process around their It infrastructure. Such as, an expansion of the company or an important department such as development that can’t get what it needs. This may come because they never staffed the IT function, someone is doing it part time as mentioned in (1) above, or everyone has been doing it themselves organically and they suddenly realize they have the tower of Babel for IT. Very common.
2. Management never hired an IT person, and someone who seems to have some knack for it has been doing their best in their spare time to manage things, but it’s driving them nuts, their (real) work is suffering, and they’re really not getting the job done, and they know it. This can be a great opportunity to have an instant ally in the company who is so grateful to have shoveled off the responsibility.
3. Post-security incidents, such as a ransomware attack, or a successful Phishing ploy where they willingly gave away a lot of money. One of our clients had been phished for $200K. None of our existing clients have had ransomware, but we’ve been asked to come in and clean up after someone has been nuked. It’s not pretty.
4. Where a company has runaway expenses with an existing IT firm, and low customer satisfaction. They feel trapped.
   1. A greedy IT shop
   2. Onerous operating parameters, like nickel and diming the client for every little touch. People get really pissed when they feel that’s happening to them.
   3. The fleet isn’t operating well, and they have recurring problems that should have been fixed by now.
   4. Laptops that walk away as mentioned above.
   5. An unstable network that has had amateur design and/or management, thus fundamental issues that affect productivity – and that aren’t getting any better no matter how much $$ they throw at it.
   6. Inexperienced IT staff that are drowning, have no clue how to get their head above water, and don’t realize how fundamentally flawed things are – that they’ll never succeed as things stand. Mgmt doesn’t know what is broken, but just knows it’s not working.
   7. A failed implementation of one sort or another, such as a big software effort that is working poorly because amateur’s put together the operating infrastructure. When I worked for AT&T/McCaw in Kirkland, I went there to take over a failed 3yr project that had spent 3.5 million and had nothing to show for it but some unimplemented hardware and software.
5. Occasionally….. you get an experienced and forward-looking executive starting a new company who fundamentally understands what a growing company needs and engages us to establish best-practices up front, to avoid all the headaches and added expense of correcting problems later. This is a dream client, a bit of a unicorn.

**Who make good clients / who do we want to serve?**

**Industries**

1. Small businesses of all sorts
2. CFO’s, Directors of Finance, VP of HR, COO, Director of Operations
3. Accountants
4. Legal –if they’re nice. Some are hard to work with, have the ‘tude.
5. Construction and heavy machinery
6. Manufacturing
7. Property management companies
8. Dentists (for some reason we have done well here)
9. Warehouse-based companies, such as food distribution
10. Non-MD medical offices, such as hearing, dental care, optometrists, chiropractic. Good experience with all of those.
    1. Traditional doctor offices often have a big organization who owns them and who deals with all the HIPAA stuff, their big EMR systems, etc. Those are not easy to deal with, the doctors are usually really demanding and hard to deal with.

**Attributes**

1. Aspirational -- prefer minimum of 12 seats… but we have many with less. We like helping needy companies as long as they are willing to pay the rates for what they need. Bigger is better to a point, and having minimums is great, but when you need seats it’s hard to say no to small businesses.
2. A strong Office Manager, Finance, HR person we can work with for day-to-day needs, parts ordering, simple tasks that benefit from a set of fingers rather than remote help, etc.
   1. We need to work with the CEO or head of finance who is both bright enough to get the value proposition and empowered enough to spend the $$ without pleading to another level.
3. Ideally, we have a good relationship with Finance because they buy into the ROI and control the spend. We also need a good relationship with HR because they control the onboard/offboard processes, the company census database, and we need to be hooked into those to do our job well.
4. They’re OK with remote provisioning and delivery of their computers to their employees. IE., they don’t need an onsite IT presence because we can have system delivered to employees, provide boxes to return things, etc.
5. They don’t expect someone to come by all the time to show their face, they’re OK with the remote relationship.
6. They are willing to spend more now to prevent known hassles in the future. For example, they are willing to buy a good system today so it lasts the full 5-year depreciation lifecycle of a corporate asset, or longer. Poorly purchased systems usually don’t make it more than 3 years, and it’s not a good 3 years at that.
7. They aren’t offended by blunt assessment and the need to spend remediation $$ up front to get things back on the right track.
8. Companies that have a higher billable rate than we do (180/hr) are great, because they look at the project work they ask us to do through that lens, and figure they’re getting a bargain for these tasks they don’t know how to do.
9. In the end, it’s all about finding a client who realizes they’re better renting an experienced team than buying staff and trying to do it themselves. It just doesn’t pencil out.

**What is our geographic range?**

Right now all of our clients are in our time zone, both the bay area and in Portland. The farther East or West you get from here, the earlier or later you have to work, which makes it harder to $taff. There are certainly enough companies in the Western US to keep us busy, but it isn’t a stretch that we could go East one time zone and do Mountain as well, further than that as things improve.

**Who do you not want to serve?**

Over twenty years I’ve learned how to see around certain corners, and that starts with who will be a good client or a nightmare client. I’ll list some industries and some attributes. These are all from experience.

* Real Estate – tends to be staffed with individual contractors who come together in a collective workspace to do their job. Unfortunately, they are usually the deadly combination of very cheap and not technical. In the past we have been asked to manage a collective space with a fleet of realtors. It didn’t work well because it’s nigh on impossible to centrally manage a group of 1099 contractors because everyone owns their own computer, nobody wants our software on their machines (or to pay for it), they all have difficult problems because they’re not up to date on their systems (cheap) and are trying to do complicated mail merges and graphics, etc., and everything in Real Estate is U-r-G-e-N-t!! About all we can do is support the building network at their overall office which isn’t remunerative enough to make it worthwhile. It’s really the combination of high-need, low-yield.
* Retail of any sort. We’re not a good fit for that urgency level or for helping retail employees with point-of-sale systems.
* Restaurants of any sort. Same reasons as retail, plus they usually operate on a shoestring.
* Companies led by young people – like the 26yo wunderkid with 30mil in VC money and some brilliant idea. They tend to be disorganized, arrogant, don’t listen, have too much money / too little wisdom, no management discipline enforced through the organization, impossible for us to consistently manage, and we don’t get the support we need to enforce any rigor in the organization. It’s hard to be successful showing ROI when the company is basically an unmanaged free-for-all – they just aren’t seasoned enough to get that running a company like this is financially unsustainable. They usually flame out.
* Financial planners as individuals. Just a step above real estate. They typically don’t have enough money and are too small to be worthwhile. However, financial planners in a wholly-owned office environment work great. Again, they get security, they get having a Helpdesk, the costs are manageable and much less than alternatives.