



My Portfolio

Kenny Perry

Introduction

Get to know me, my journey
and my plan ahead

01

02

Lessons Learned

To critique thyself : What we
did right and what we did wrong

03

04

Product Development

Design, market release, and
improvements over time

Questions & Discussion

Questions, Comments, Hot
Takes?

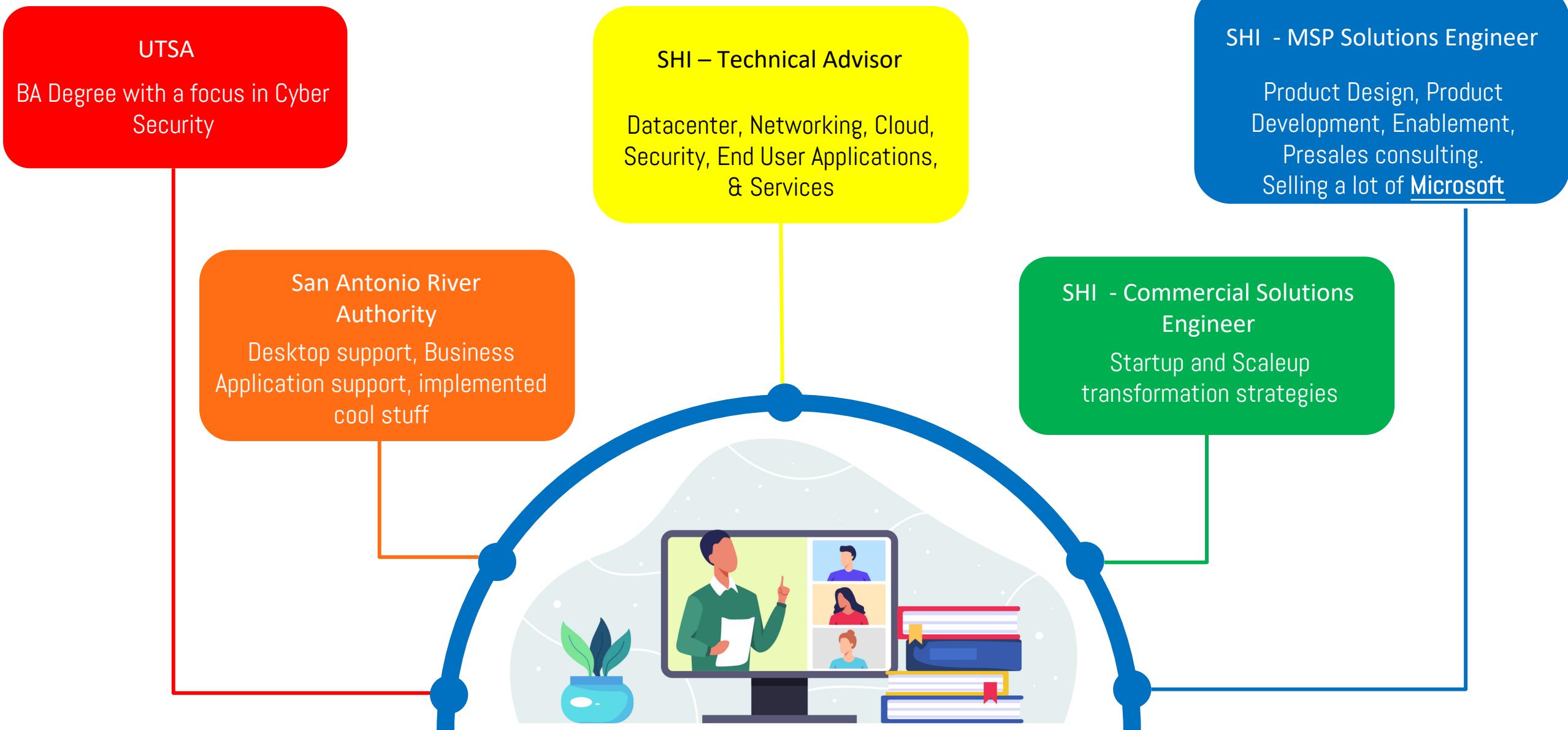
Howdy! 🙌

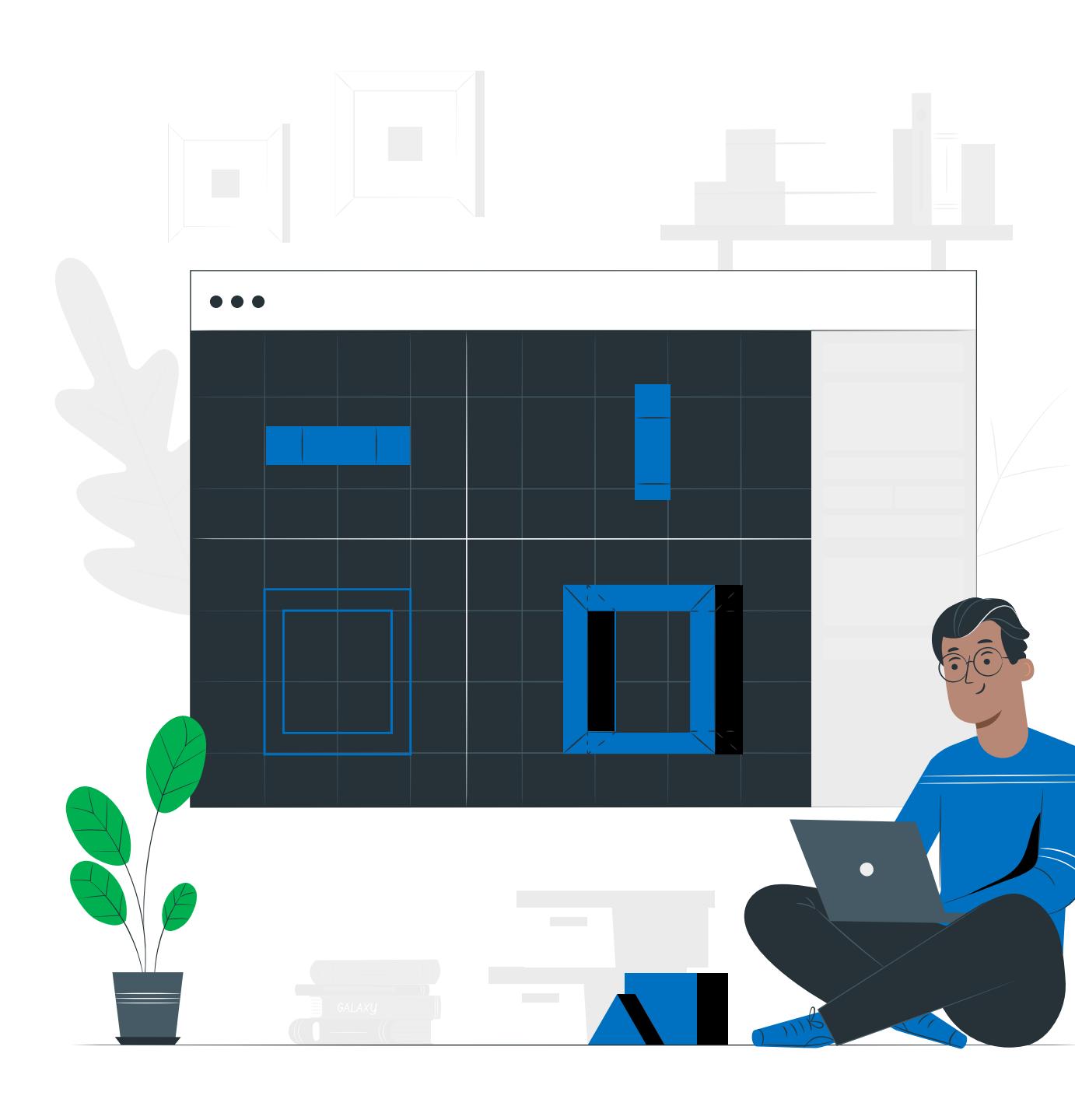
I'm Kenny, Professional Solutions
Engineer based in San Antonio, TX

Expertise in Technical Consulting,
Program Management, Product
Development, and Customer Experience



My Journey through IT





Product Development

Initialized and Developed a Managed Services Platform for a \$14 Billion IT services provider. Focused on delivering a modern approach to IT through technological transformation

Background Deliverables

Context:

CEO tasked us with exploring ways to expand our current SMB Market presence.
We were to identify and develop a Go-to-Market Strategy focused on Managed Services that would more leverage to sell into startup and SMB customers

Goals:

- Increase Customer Activity (spend + touch point + opportunities created)
- Deliver a managed offering in 12 months, generating monthly recurring revenue for the business

First Five Moves



OBJECTIVES CORE

Adoption

Increase customer spend throughout SHI's solutions practices.

Instantiate a Managed Services Program to facilitate transformation

Increase Revenue/GM

GTM with Scalable MSP Offering

Transformation

Focus on people, processes and tools to deliver co-value services

Allow companies to get out of the business of managing IT and focus time on more strategic teams (Developers, cloud engineering, CIO)

Expedite Cloud Adoption

Optimize IT Operations

Do more with less

Experience

Leverage our 30 years in business with 700+ solutions engineers to select best of breed products for our Managed Services

Develop and Retain Top Talent

Deliver Value Added Services

Project Overview

Key Employee Additions

Phase 1 – TAM (ME), Managing Dir., CX Dir., Mgr. of Engineering
Phase 2 – TAMs, PM, Sys. Engineers, SD Mgr., SD Techs
Phase 3 – SE (My role change), PMs, Sales Dir., Sales Reps
Phase 4 – Sys. Engineer, SE, Product Developers
Phase 5 – Added personnel across all teams

Timeline

Design	Test	Release	Improve	Scale	Expand
Platform Development Product Strategy Content Creation	Beta Testing, Service Definition Process Workflow	Create Messaging Publicly Facing Material Launch to Public	Continuous Innovation Service Tiers Platform Journey	User Acquisition Conversion Optimization Scaling	User Acquisition Conversion Optimization Scaling
Feb '21 – May '21	Jun '21 – Nov '21	Dec '21 – Mar '22	Apr '22 – Jun '22	Jul '22 – Dec '22	Jan '22 – Jun '22
Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6

Product Design

Phase 1 | Feb '21 – May '21

Challenges Identified

- 1) Lack of **synergy** amongst already established internal service delivery teams
- 2) "**IT Transformation**" means a lot of different things to customers at different levels of their IT Journey
- 3) Alignment with Legal department on **risk, assumptions, customer/provider responsibilities**
- 4) "*Driving the car and while building it*"

My Core Objectives

- 1) Understand SMB primary goals, needs, pains, and current behaviors within an **IT department**
- 2) Develop **Service Framework**
- 3) Select software platform partners for **key transformative areas**
- 4) Develop **beta** platform

How I visualized this service →

Service Catalog

Support Services

- Zero-Touch Deployment
- Device & User Management
- 24x7 Tier 1–3 Helpdesk

Network Management

- Network Site Deployments
- Next Gen Managed Networks
- Connectivity Monitoring

SHI One Portal

- Central Support Desk
- Service & Asset Management
- Curated E-learning & Reporting

Security Services

- Identity Management & Security
- Email and Endpoint Security
- Managed Detection & Response

Cloud Management

- Managed Cloud & Apps
- Managed Backup
- Event based Monitoring

Customer Experience

- Account Management & Consulting
- Quarterly Business Reviews
- vCIO led Annual Strategic Planning

On Demand and Add-On Services:

On-Site Services

Migrations

Project Services



Phase I – Product Design

My Accomplishments

Onboarded first beta customer – Financial Institution

- Services included: Managed IT operations, Support Desk, Network, Security, and Cloud

Developed key materials and documentation

- Process Management - Statement of Work, Service Guide
- Presales Support - Pitch Deck
- Project Management - Project Plan template, Configuration Items

Operationalized platform

- Integration with SHI proprietary Service Management Portal

Key Takeaways

Wasted time spent perfecting a product

- Could have focused more on finding minimal viable product

Reduced time to deployment

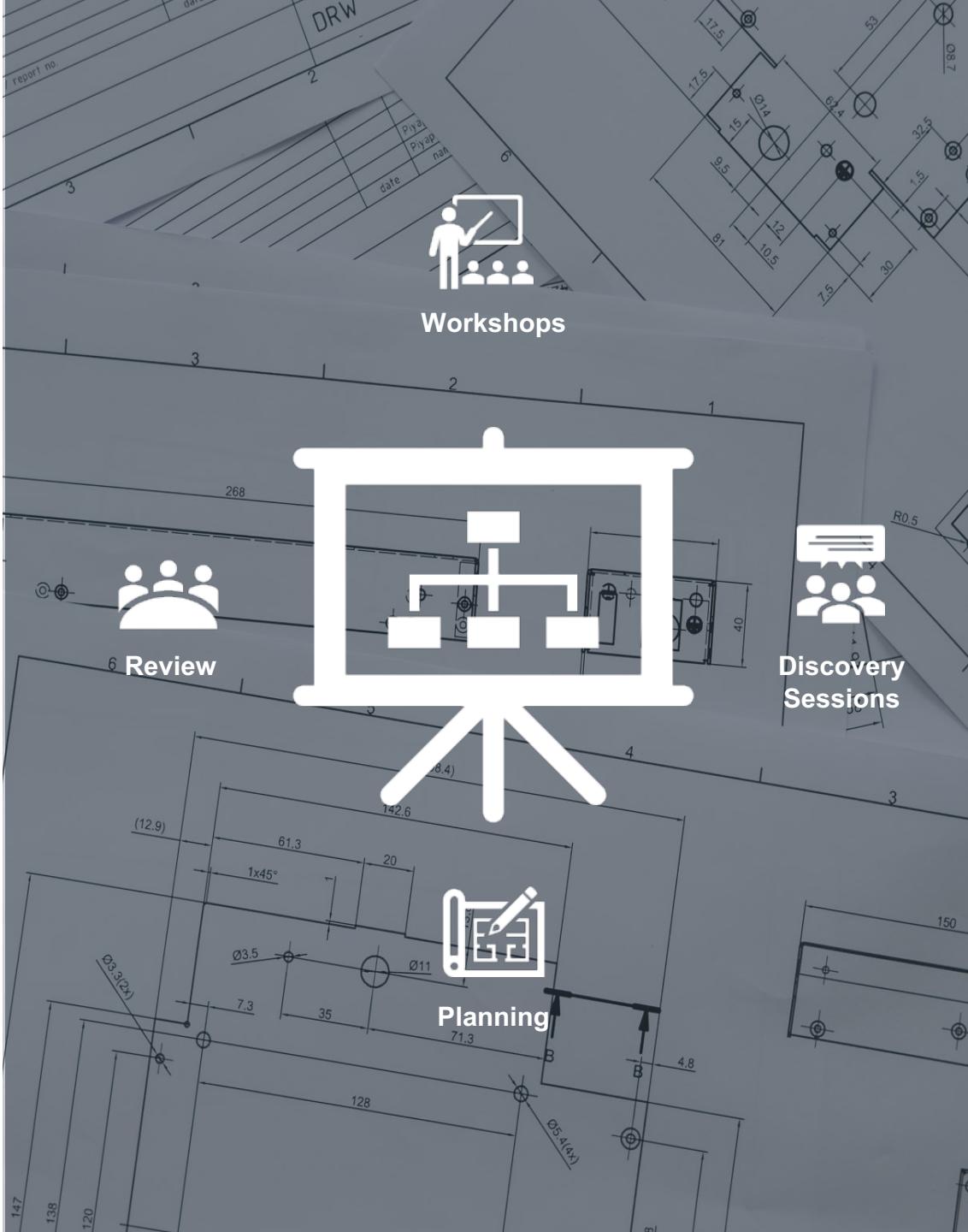
- Leveraged existing partnerships to build efficiencies in the platform

Discovered a very niche market for Managed Services

- Providing a complete solution works best for well funded Startups

Focused on a golden triangle for support – People, Process, Tools

- Customers want to move away from "Your mess for less" approach to IT Management



Product Testing

Phase 2 | June '21 – Nov '21

Challenges Identified

- 1) Gaining early adopters – **external campaigns** and **cold reach outs** were methods used
- 2) Building **trust** with established sales teams was an uphill battle
- 3) Establishing **scalable** and **automated processes** and service runbooks consumed majority of service development time

My Core Objectives

- 1) Move from beta platform into **full production**
- 2) Develop **Service Definition** (*Phased approach*)
- 3) Establish MSP partnership with software providers
- 4) Align on **process workflows** and develop **handbook page** to keep **SOPs** and **Runbooks**

Phase II – Product Testing

My Accomplishments

Onboarded 3 Gamma customers

- Increase monthly recurring revenue to 40k
- Ended phase with 200 end-users under management

Hit target release timeline

- Went GA with service in December 2021 – read our press release
- <https://www.businesswire.com/news/home/20211215005206/en/SII-Brings-Big-Business-IT-Agility-to-SMBs-with-SII-Complete-Managed-Service>

Developed MSP partnerships

- Established agreements with 7 major IT vendors to provide a differentiated service leveraging best of breed tools in our practice

Assisted in hiring key personnel to team

- Followed EARL method for hiring
- Led 2nd or 3rd round of interviews for 6x Engineers and 1x Technical Account Manager

Key Takeaways

Heading in the right direction

- Followed similar growth compared to main competitor (Electric.AI)
 - 6-year-old Unicorn company
 - Took 12 months to develop service. After GA, 10 months to reach 1k end-users under management and 4 months after to reach 2k.
- Successfully completed 2 onboarding and transformation projects
 - Initial customer feedback was positive (Avg. 4.9/5-star rating)



Product Release

Phase 3 | Dec '21 – Mar '22

Challenges Identified

- 1) No formal sales enablement strategy
- 2) High time to delivery for initial onboarding – higher than expected cost for transformation
- 3) No formal Process Management
- 4) Small & medium firm users' work paradigm = have a jack of all trades not a team

My Core Objectives

- 1) Align with SMB division leadership team on strategy
- 2) Develop Service Framework
- 3) Grow and Develop team
- 4) Focus on key performance metrics and established reporting on service delivery

Phase III – Product Release

My Accomplishments

Developed enablement strategy

- Establish formal training materials,
 - Developed documentation for FAQs, SOPs, Battlecards
- Lead 12 enablement sessions for SMB and Startup organization

Product design

- Worked with Product Development team to create video on service. Check it out here!
 - https://www.youtube.com/watch?v=tz5TN_Yj5QE&themeRefresh=1

Launched campaigns

- Worked with SDR's to put together 4 campaigns over the quarter
 - Why SHI for Support Services
 - Why SHI for Network Services
 - Why SHI for Security Services
 - Why SHI for Cloud Support Services

Key Takeaways

Not a great conversion rate

- Sales team cold reach out to over 10 thousands CRM contacts - <1% response rate

Long sales cycles

- Averaging 1x closure a month with 3–4-month sales cycle

Need to look outside of SMB and Scale up for more opportunities

- Need to refocus and direct service for commercial/enterprise customers



Product Improvement

Phase 4 | Apr '22 – June '22

Challenges Identified

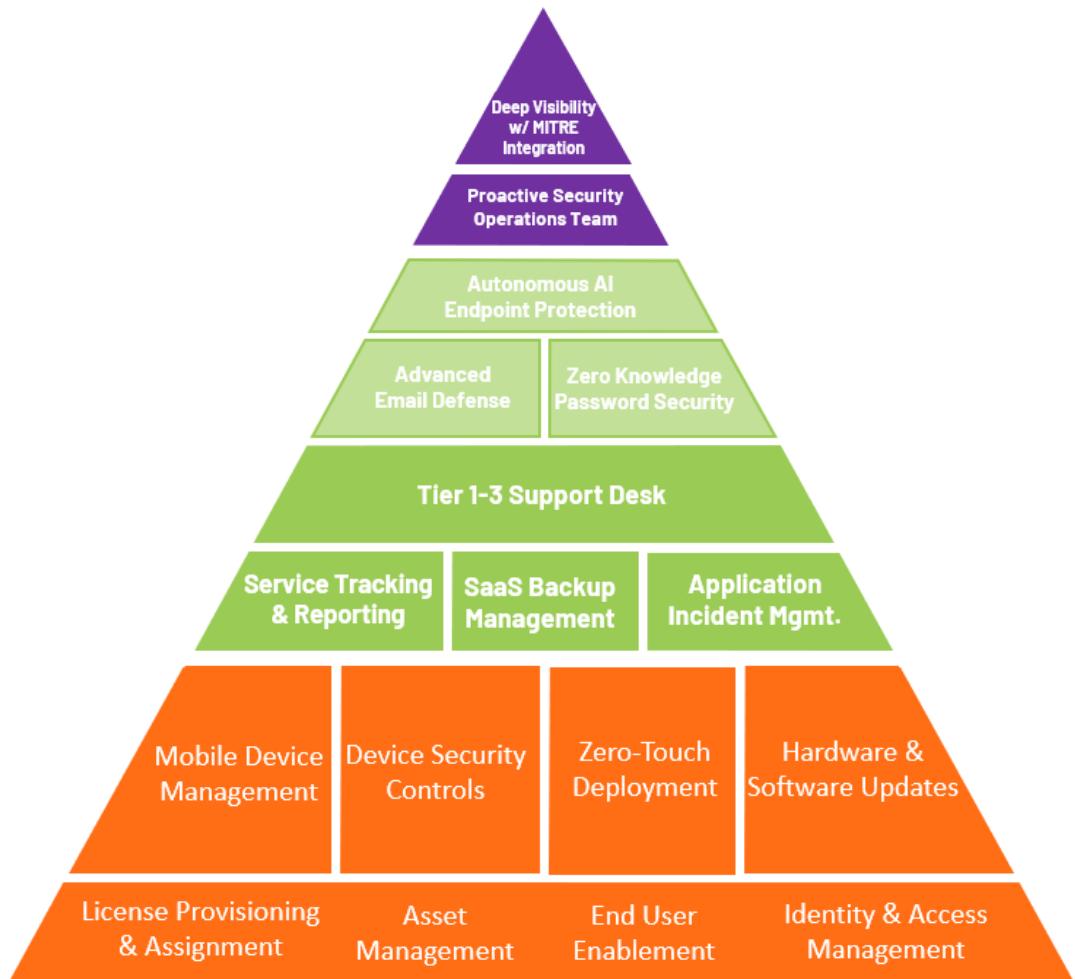
- 1) Need to use existing service overlay teams to push message to SHI account executives
- 2) The go to market strategy was not fully aligned with customers perceived value
- 3) Pre-sales activities accounting for more time than team can work. *Need to automate where possible*

My Core Objectives

- 1) Align with Services and Engineering overlay divisions to spread the message of our service
- 2) Develop Service Tiers
- 3) Grow and Develop team
- 4) Hit 1,000 end users under management

How I visualized a Tiered model for services →

SHI Complete Service Tiers



Customer Challenges

- Detection and response
- Security compliance
- Secure monitoring
- Attack surface visibility

SHI Delivered Outcomes

- Layered security approach with proactive security operations
- Deeper visibility on endpoints, networks, and cloud workloads

Secure – Premium Security

- Limited internal IT support
- Incident and problem management
- Lack of skills to manage tools
- Lack of time to complete requests

- Enhance end-user centric support experience
- Time recovered to focus on projects that are more impactful

Transformation – Secure Modern Workspace

- Onboarding/offboarding processes
- End user experience
- Device security and management
- Identity and access management

- Time recovered to focus on operations that are more impactful
- Solutions that automate time consuming and repetitive tasks

Foundation – Modern Workspace

Modifications

Deeply understand problem space

How can we use data to further our understanding of the Managed Services Space

Partner research, Market insights,
Customer feedback

Categorization of "Fit" and "Not a fit".
Developed outcomes of why "Not a fit"

Internally delivered surveys to gauge
customer satisfaction and changes to
service



Market Analysis

Analytical Reporting

Customer Analysis

Phase IV – Product Improvement

My Accomplishments

Assisted in hiring key personnel to team

- Hired Solutions Engineer to assist me in presales solutions engineering

Created and launched Service Tiers

- Produced data gathered on 200 unique customer meetings which highlighted major concerns with platform.
- Developed a flexible tiered approach to land and expand. Focused on building a foundation and allowing customers to grow into other services
 - Modern Workspace
 - Process centric – Lifecycle management and Zero-Touch Deployments
 - Secure Modern Workspace
 - End-user centric – Incident and Problem Management
 - Add-on Enterprise tools for Endpoint Detection and Response, Password Management , Email protection and SaaS Backup
 - Premium Security
 - Managed Detection and Response with Proactive Security team

Hit our KPI of 1000k end users under management

- Landed Half at 1,240 total

Key Takeaways

Need to lay groundwork for expansion into Mid Market, Enterprise and Public

Sector accounts with focused services

- Must rethink a new go to market strategy to be successful
- Need to target larger account sizes to hit future KPIs



Check out our Cake :)



Product Growth

Phase 5 | July '22 – Dec '23

Challenges Identified

- 1) Larger sales team hesitant to pitch a **new service**
- 2) Need to be more aligned with strategic teams on messaging to customers
- 3) Need to **define processes** for AE sales teams

My Core Objectives

- 1) **Break down perception of service.** Though we started in SMB we built a platform to scale to large Enterprise
- 2) **Develop SOPs** for Presales and Account Executive
- 3) Deliver 30,60,90-day training for **new Solutions Engineer**
- 4) Plan and **deliver internal enablement** sessions
- 5) Double end users under management – **2k by end of H2**
– 22

Phase V – Product Growth

My Accomplishments

Transitioned to a Solutions Engineer role

- Developed 30/60/90 onboarding plan to ensure onboarding was efficient

Public Speaking

- Led 2 large scale and 1 focused public speaking sessions
 - SpiceWorld (September '23) – 50 people
 - Microsoft Partner Showcase (October '23) – Security and Endpoint Manager – 100 people
 - SpiceWorld Video Meetup (November '23) – 50 people
- Led 20 internal enablement session across Enterprise, Mid Market and Public Sector teams
 - Generated millions of dollars in pipeline through trainings

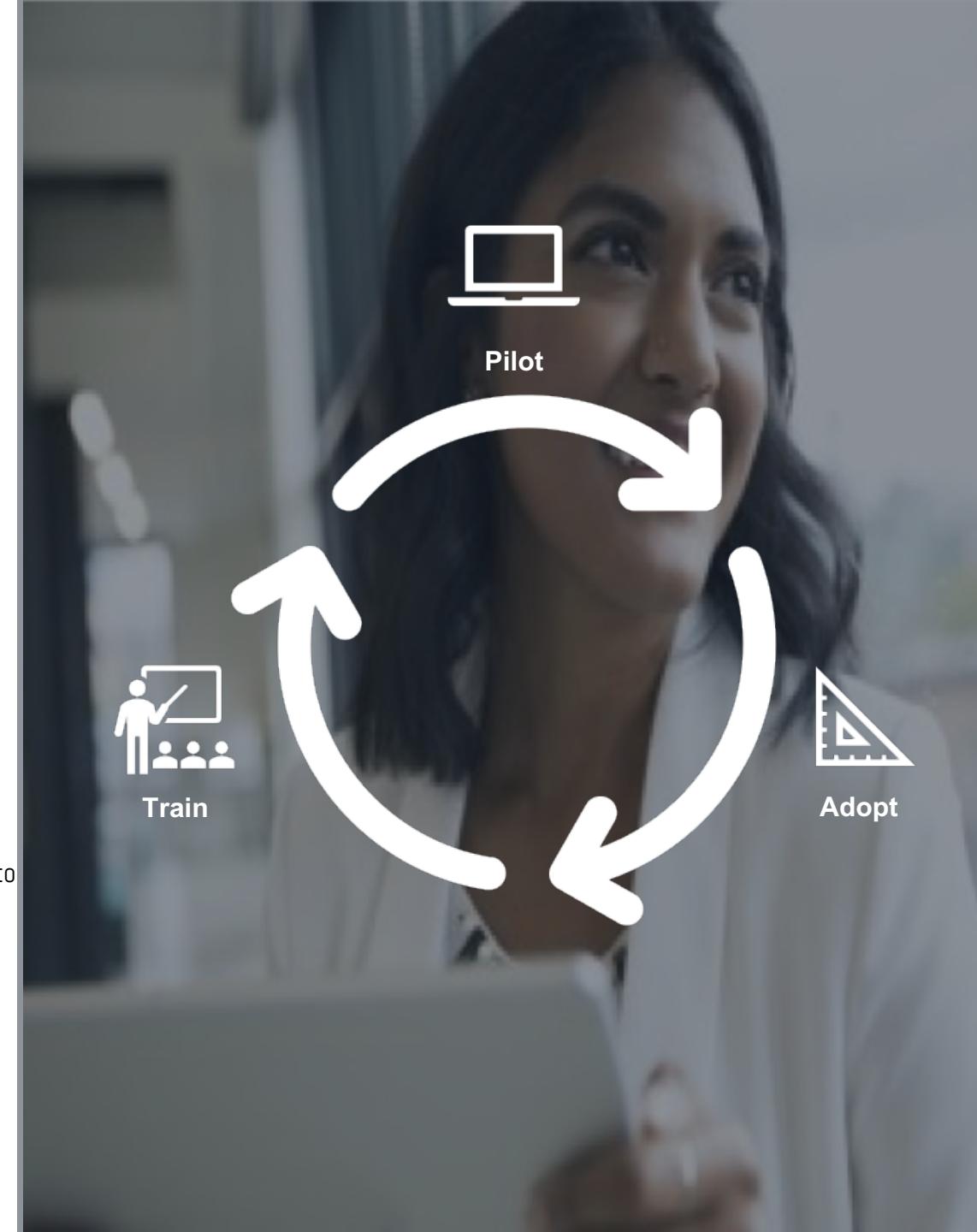
Key Takeaways

Hit our KPI of 2,000 end users under management

- Going into new year changing KPI to Revenue based model

Opportunity pipeline reached 5 million in open deals

- Trainings have opened the door for more conversations with sales and engineering overlay teams to see our full managed services capabilities and strategize how their customers can leverage our service



Product Expansion

Phase 6 | Jan '23 – June '22

Challenges Identified

- 1) Larger sales team hesitant to pitch a **new service**
- 2) Need to be more aligned with strategic teams on messaging to customers
- 3) Need to **define processes** for AE sales teams
- 4) Aligning new service offerings to the **core values** of our customers

My Core Objectives

- 1) Launch **Networking Managed Services** offering
- 2) Launch **Microsoft Managed Services** offering
- 3) **2.3m revenue Quota H1 -2023**
- 4) Sign first **Enterprise Customer** – Establish trust in organization

Phase VI – Product Expansion

My Accomplishments

Developed and launched 2 new services

- SHI Expert Support - Created support service focused on support only for Microsoft products and services
 - Ex.) incident and problem management for Azure, M365, Windows Server, SQL Server
 - Targeted customers transitioning from unified or premier support agreements; alternative to enterprise support agreements
- SHI Connect – Launch standalone networking service focused on supporting branch and campus wireless
 - Monitoring Services – 24x7 alerting and triage
 - Management Services – Monitoring + Incident/problem management

Public Speaking

- Led 1 large scale and 1 conference session
 - SHI Internal 3rd Friday training – 300 employees
 - SHI Executive Briefing Conference (March '23) – 12 people
- Led 30 internal enablement session across Enterprise, Mid Market and Public Sector teams

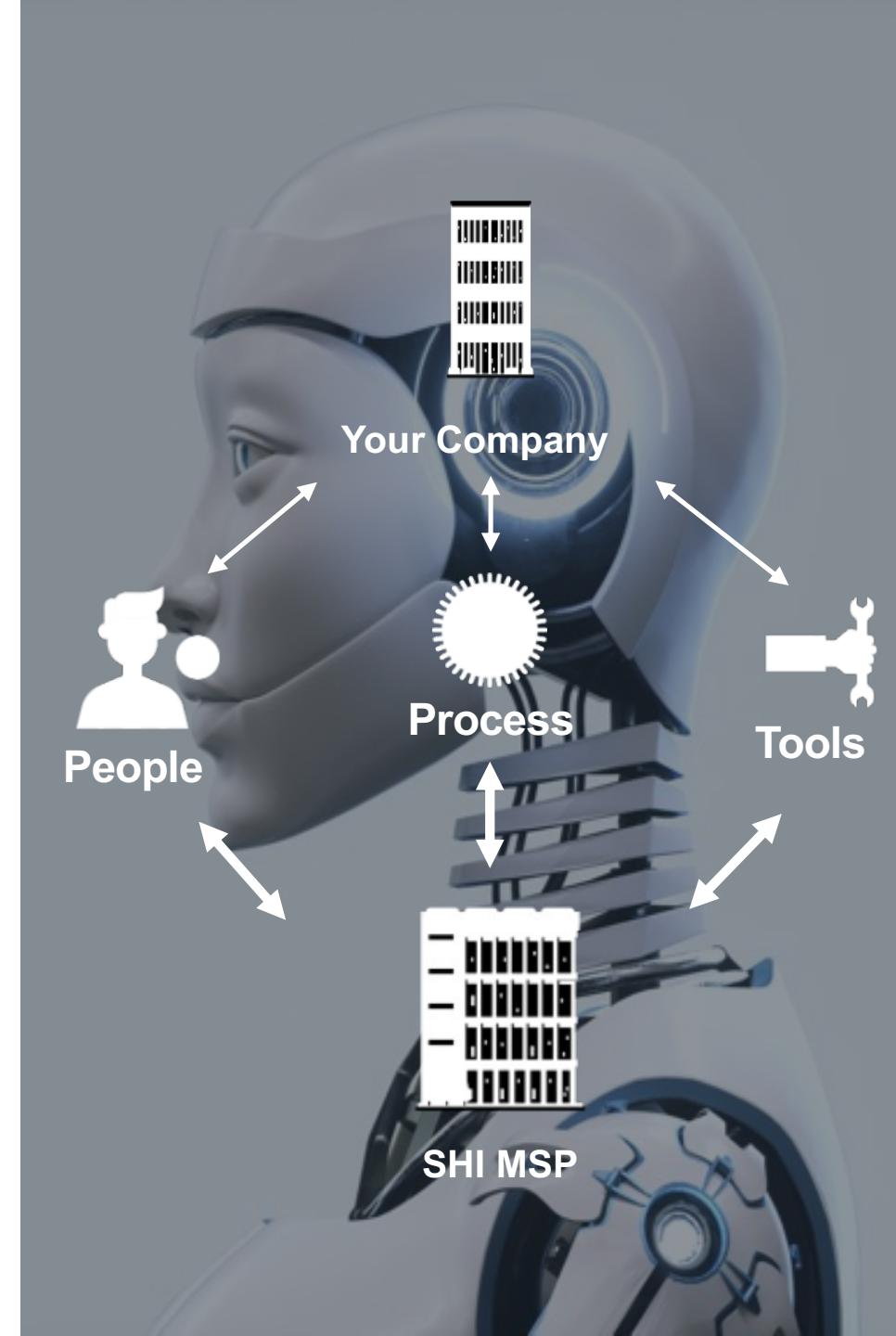
Key Takeaways

Microsoft support is going to exponentially grow

- More than 70% of rev generated from Microsoft support options.
 - Aligning with SHI's \$10b Microsoft practice to expand into all customer segments
- 6x higher closure rate than other managed services

Enterprise customers focusing on transformational services need the most help

- Identify deep pains in MDM/IDP configurations as companies move toward zero touch deployments and cloud-based management



By the end of H1 2023

SHI Managed Services Portfolio

Microsoft Support	Public Cloud					SHI Complete						SHI Connect	Other
OEM Led	SHI Led	AWS Azure GCP				Foundation	Transformation	Secure	Secure Networks	Observability			
Enterprise Support	SHI Expert Support	Professional Support	Managed Support	Agile Cloud Engineering	Managed Device	Managed Identity	Secure Modern Workspace	Premium Security	Managed Networks	DataDog			
SHI Escalation to Microsoft	SHI Certified Eng.	SHI Certified Eng.	24x7 Monitoring	Desk-to-Desk Tier 2-3 Support	Policy Management	User Creation (Onboarding)	24x7 Tier 1-3 Incident Management	AI Endpoint Protection	Managed, Detection and Response	Intrusion Prevention	24x7 Incident Monitoring	Flexible Billing	
SHI Badged TAMs	Desk-to-Desk Tier 2-3 Support	Dedicated TAM	Proactive Management (Patch and Backup)	Rate Card for Projects	Patch Management	User Deletion (Offboarding)	SaaS Backup Management	Password Security	Log Analysis and Search	Policy Management	App Performance Monitoring	Dedicated TAMs and escalation	
US Based Support	US Based Support	Annual Architecture Review	OS support	Microsoft transfer if necessary	24x7 Device Monitoring	Access Management	Advanced Email Protection	Threat Intelligence (IOC and IOA)	SD-WAN Optimization	Zero-Touch Site Deployments	Technical Onboarding		
Proactive Hours		Client Retains hands-on capabilities	Hands on Keyboard		Desk-to-Desk Support for Intune/Jamf			24x7 Concierge Security Team	Proactive Management	DNS & MDR Security Services	Platform Management		
Block Hours	Block Hours	8% Cloud Bill	25% Cloud Bill	Rate Card	# Devices Month	# Users Month	# Users Month	# Site(s) /mo. # Users /mo.	# Site(s) /mo. # Devices /mo.		SKU's		



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//WEBINAR ALERT//

Automating the Employee IT Lifecycle: Device Deployment and Management for the Hybrid Workforce

Organizations have always struggled with employees, and the onus typically falls on workforces have only made this more difficult.

Attend the
Deployment
onboard
handle compli

Register
#automate
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#Kenny

SHI |

Automate
Deploymen

Novembe

Kenny Perry
Managed Services
Solutions Engineer
SHI

Zachary Fincham
Engineering Program
Manager
SHI

Register now!

Thu, Nov 17, 2022, 11:00 AM - 11:30 AM CST

Automating IT Lifecycle: Device Deployment and Management for Hybrid Workforce

Online

SPICEWORLD
— IT CONFERENCE —

Stay Ahead of the IT Curve by Being in the Know.
Networking with Peers + learn about new IT Solutions.

Register

Microsoft Partner Showcase

Security & Endpoint Manager



Kenneth Perry
Solutions Engineer



Steve Weiner
Principal Architect

How To Bridge the Gap Between Security and Simplicity With LastPass | 3:15 PM - 3:45 PM

Speakers: Jess Pagonis | Sr. Product Marketing Manager | LastPass, Vinh Doan | Manager SMB Sales | LastPass

The Future of IT Documentation | 4:00 PM - 4:30 PM

Speakers: Colin Smith | Customer Success Engineer | IT Glue

Lifecycle Management for Hybrid Work

The Hard Truths Behind the World Changes



Don Nelson
vCIO Corp Services - MSP



Kenny Perry
Corp Solutions Engineer - MSP

WEDNESDAY, JUNE 29TH AT 11:30AM PDT

SHI Presents: Meraki Cloud Managed Networking

Grab a slice and fire up your Webex for our latest lunch and learn. Gain valuable insights from SHI into Meraki technology, use cases, best practices, live demos, and the latest product and feature announcements and enhancements.

This webinar will cover:

- Meraki Cloud Managed IT Overview
- Meraki Customer Use Cases
- Live Meraki Dashboard Demos
- SHI + Meraki Complimentary Solutions

a free pizza to enjoy during the session.
Order with your pizza preference.

SHI

So how are we doing today?

Where we started April 2021

SMB MSP Progress Update - April 2021 v3 - Saved

File Home Insert Draw Design Transitions Animations Slide Show Review View Help Search Share

The Team

Kenneth Perry
Technical Account Manager
SMB MSP Sales & TAM

Solutions Director
SMB MSP Sales & TAM

New Hire
Managing Director
SMB MSP Operations & Product Development

New Hire
Program Manager
Meraki & SMB MSP

Agenda

- What we are building
- The Team
- Customer Profit & Engagement
- Collaboration with SMB Sales
- Tools Integration
- Foundation Materials
- Customer Perform
- Q3 Revenue 30 = 40 = 10

What we are building

Value Statement

To provide a transformative, secure and modern enterprise class IT experience to small business customers

Building Concepts

- Next-generation Outsource Platform
- Cloud Migration

What do SMB's want to outsource to MSPs?

Total IT Managed Services

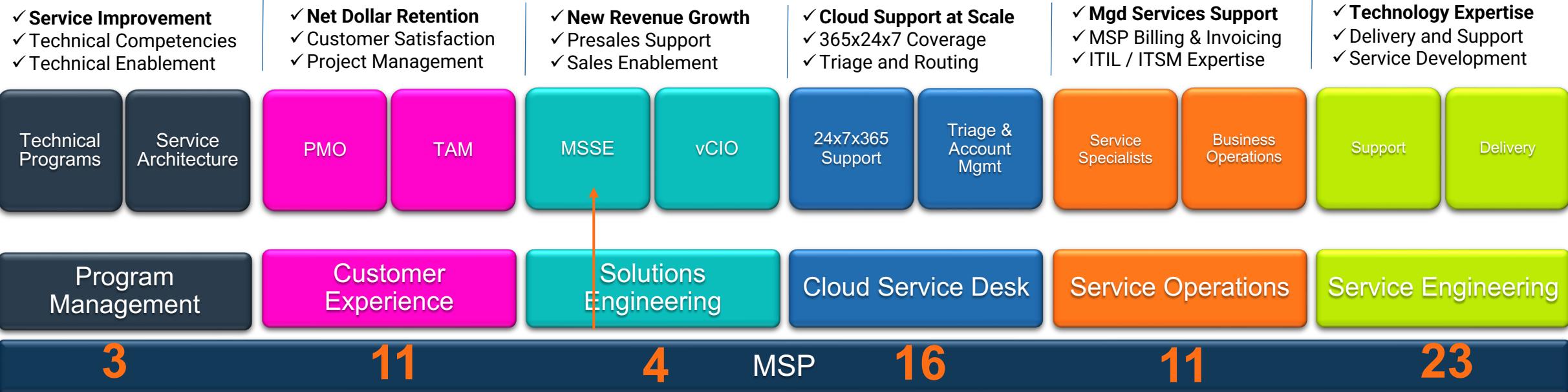
Category	Service	Percentage
IT Infrastructure	Cloud Migration	40%
IT Infrastructure	Cloud Computing	30%
IT Infrastructure	Network Security	20%
IT Infrastructure	IT Support	10%

The Team

Organizing for Growth - 2023

68 MSP Team Members

Building success through Value Streams & Alignment

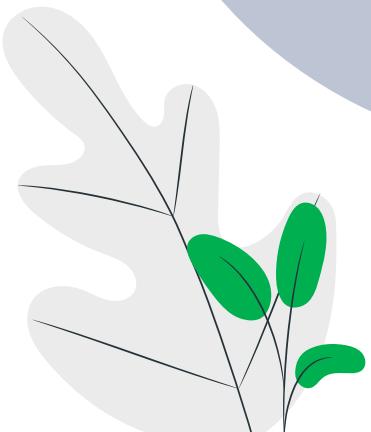


H1 2023s KPI

Quota: Finished at \$4.04m/ \$2.35m goal
Generated: \$10m in new pipeline



After 2 years we took an idea,
crossed our fingers and set sail on
an amazing journey that has
grown into a leading MSP service
focused on delivering an
exceptional customer experience
while we help our customers
select, deploy and manage
technologies.



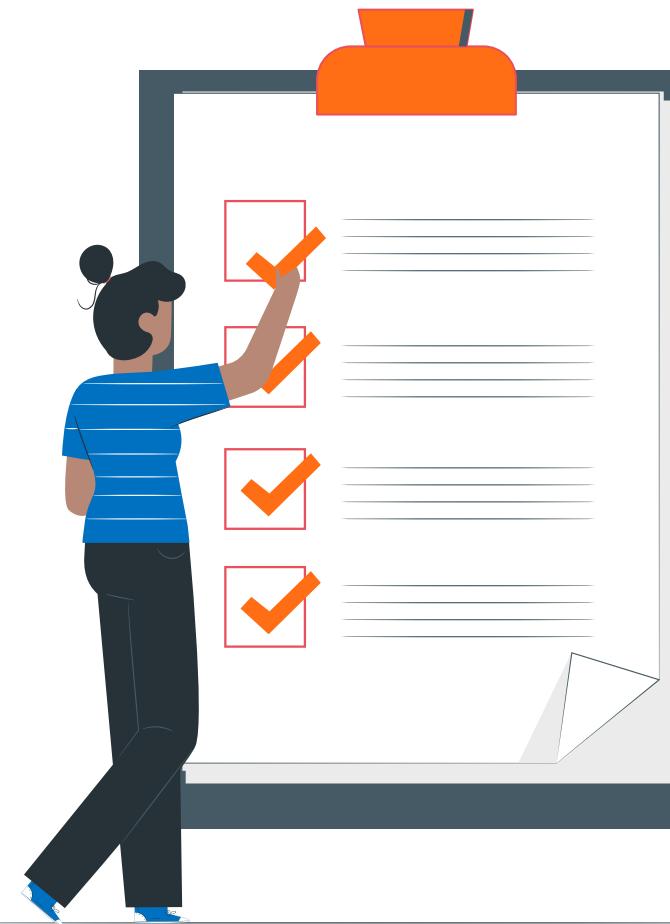
Impact

Product Strategy

Knowledge & insights used to deliver and influence recommendations on 2-year product roadmap, approved by SLT

Measurement

Baseline measures, setting stage for benchmarking and validation



Artifacts

Created dozens of presales documents to under service delivery, sales motion and service enablement

Influence

Impacted product areas which increased adoption of the platform

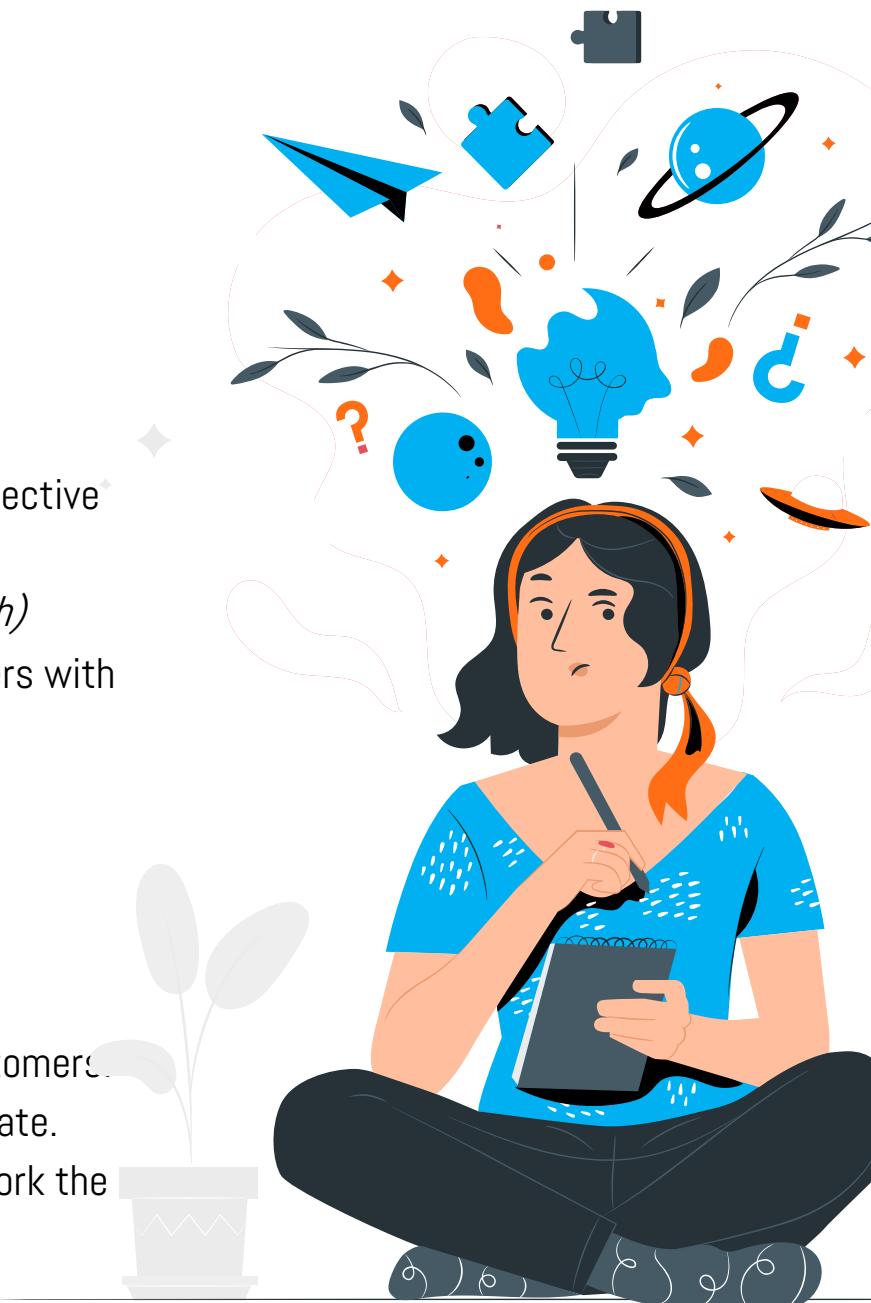
Reflections

Challenges

- High level of ambiguity for what is an MSP. Still spending most time challenging perspective
- The Modern Workforce requires a lot of upfront transformations
- Difficult to get my hands on customer data (*had to understand pains through outreach*)
- Service will need to be even more flexible as we encounter unique enterprise customers with differentiated systems and processes.

If I could do it again....

- Build the car before trying to drive it. So much time spent on constant interactions to processes and updates. Many hours spent on change due to new customer needs.
- Be more proactive on trainings. Empower teams to lead opportunities and qualify customers. This would grant us an exponential number of prospects and potentially higher close rate.
- Don't be afraid to say no. Lost time due to poorly qualified opportunities we tried to work the customer into. They were a square and we were a donut hole.



IP Submissions acquired

Acquired 7 SHI Approved Intellectual Property content submissions between 2020 – 2022

See some of my work !

Pitch Deck

- Publicly Facing Reference Document used by Sales to Present SHI Complete Platform

Battlecards

- Internally facing Sales training Material used to ramp

ROI

- Publicly Facing Document used to generate Customers' Financial POC with information on current IT Cost and saving with SHI Solutions
 - Included Dozens of factors such as (Personnel Salaries, hours spent tracking security events, hours spend supporting applications, Hours spend onboarding and Offboarding employees

Pricing Proposal

- Publicly facing Pricing Document used By SHI Complete team to present SHI Complete Services and Pricing structure

Tier Guide

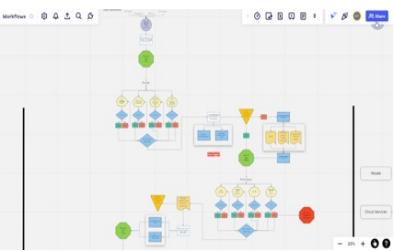
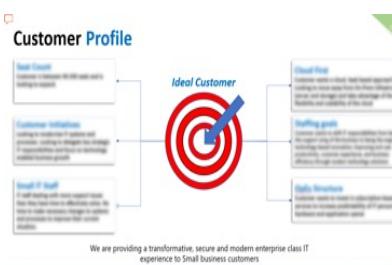
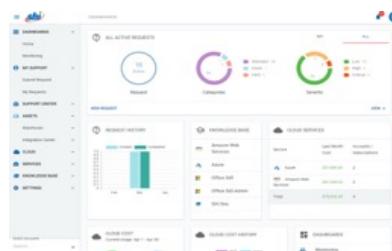
- Publicly facing reference document used to compare different services tiers based on their offering

Reference Question Documentation:

- Used to enhance the New Engineers abilities to ask questions and shift conversations

Sales Overlay Manufacturer Content Guide:

- Used as a VLOOKUP to find Manufacturers Names, services offered, products offered, and comparisons across similar manufacturers in their field



QUESTIONS?

Thanks for coming to my TED talk.