

SOP: Remote Support Methodology with ConnectWise (Incorporating CompTIA Troubleshooting Theory)

Purpose:

This Standard Operating Procedure (SOP) outlines the process for conducting remote support engagements using ConnectWise.

Scope:

This procedure applies to all IT technicians and support staff involved in providing remote support using ConnectWise.

Responsibilities:

- Implementation: IT Support Technicians
- Following: All IT technicians providing remote support
- Reviewing: IT Support Management
- Maintaining and Updating: IT Support Technicians

Prerequisites:

ConnectWise user account with appropriate permissions.

Valid user credentials for authentication.

Definitions:

- Policy: Broad, overarching guidance explaining "why" certain practices are implemented.
- SOP (Standard Operating Procedure): Specifies "what, when, why" actions; may consist of multiple SOPs supporting a specific policy.
- Work Instructions: Detailed "how-to" guides providing step-by-step directions for a particular task.

Procedure:

Overview:

This procedure focuses on the methodology for remote support engagements using ConnectWise, addressing how remote support will take place and the troubleshooting methodology technicians will follow.

Remote, Offsite Support Engagements:

Overview: Outline how remote support engagements will be conducted using ConnectWise.

- Steps:
 - Log in to ConnectWise with valid user credentials.
 - Access the remote support section to initiate engagements.

Troubleshooting Methodology:

Overview: Define the troubleshooting approach during remote support engagements, incorporating the CompTIA Troubleshooting Theory.

Steps:

- Gather information about the issue from the end user:
 - Communicate with the end user to understand the reported issue.
 - Ask questions aligned with the CompTIA Troubleshooting Theory to gather relevant information.
 - Document error messages, symptoms, and any recent changes to the system.
- Establish a Theory of Probable Cause:
 - Analyze the information gathered and form a hypothesis about the root cause.
 - Consider the most likely causes based on the CompTIA Troubleshooting Theory.
- Test the Theory to Determine the Cause:
 - Use remote access tools through ConnectWise to perform diagnostic tests.
 - Utilize testing tools and methodologies to narrow down potential causes.
 - Gather additional data to confirm or refute the initial theory.
- Establish a Plan of Action to Resolve the Problem:
 - Based on the confirmed cause, create a plan to resolve the issue.
 - Consider the most efficient and effective solutions, taking into account the user's environment.
- Implement the Solution or Escalate as Necessary:
 - Apply the chosen solution remotely using ConnectWise.
 - If the initial solution doesn't work or requires additional resources, escalate the issue following established procedures.
- Verify Full System Functionality and Implement Preventive Measures:
 - Confirm with the end user that the problem has been resolved.
 - Implement preventive measures remotely to avoid similar issues in the future.
 - Document the solution and any preventive measures taken within ConnectWise.

Expected Results:

- Troubleshooting Methodology: The troubleshooting approach will follow the systematic CompTIA Troubleshooting Theory, ensuring a thorough and effective resolution of remote support issues.

By incorporating the CompTIA Troubleshooting Theory into the ConnectWise-based remote support methodology, your team can benefit from a structured and proven approach to problem-solving in IT support engagements.

Revision History:

- Version 1.0 (2023.11.13): Initial document creation. Dominique Bruso

References:

- Source 1: So, You Want to Write an SOP?
- Source 2: 37 Best Standard Operating Procedure (SOP) Templates
- Source 3: <https://www.comptia.org/blog/troubleshooting-methodology>