Managing Your *Information Technology*, before *IT* Manages You

Do you want to know how you can **improve** your firm management, **take better control** of your business expenses and actually **reduce** your operating costs? There's no trauma involved, there's no adventure of blind exploration, and the potential benefits of the solution are now well documented. IT (information technology) outsourcing in the form of managed services is one strategic business direction that can help you meet your organizational goals and your budget.

The **managed services path** is well trodden and is proven to be a valuable and viable strategic business option for small to medium sized accounting, tax professional, financial service and professional service firms. No longer exclusive to large corporations and government, the same benefits of a managed services approach can now be gained by everyone.

Managed services programs are continuing to rapidly gain ground for three solid reasons that are further addressed in this White Paper

- To improve business **cost savings**
- To drive technology **efficiency** and business **value**
- To **level the playing field** for smaller organizations

All businesses, regardless of size, have a need for computer and information services support. Many, however, cannot justify or budget for a full-time support specialist, but still want round-the-clock peace of mind in knowing systems are well managed and under control. There is also a need to have confidence that the expertise to seamlessly minimize any impact in terms of costly and unforeseen downtime and disruption is on hand and already budgeted.

Organizations today recognize the importance of implementing an operating model that will **serve their own and the customer's needs, while optimizing results**. Managed services can deliver strategic and operational value because it has the potential to deliver ongoing technology **budget savings** in addition to **business benefits**, depending on the function(s) outsourced.

Your firm can take advantage of managed services to achieve your top IT priorities. Having outsourced IT management, user support and proactive maintenance combined, on an ongoing basis, allows you to constantly and consistently exceed expectations through:

- **Increasing** levels of support and network availability without additional staff
- **Making** your technology budgets more stable and predictable
- **Providing** access to the latest technology with limited risk
- **Providing** access to an enhanced skills base without increased training costs
- **Making** it easier to adapt to changing business conditions
- **Gaining** a reliable and tested disaster recovery plan to limit downtime

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But what is managed services and is it for small firms like mine?

Managed services is a comprehensive, end-to-end technology support service. Generally, and depending on the service provider, a managed services program is based on the philosophy that by providing clients daily, proactive monitoring of network systems and support, a provider can reduce and/or eliminate technology-based issues and emergencies.

Ultimately, the goal of managed services is to keep clients focused on their business by reducing downtime and providing a single point of contact for all technology-based needs.

As a flexible IT support model, a managed services program is able to reduce ongoing costs by using different resource levels effectively and at the appropriate time. This generally includes a mix of remote and onsite support.

For those providers who also give their clients a **fixed monthly fee**, the burden is on the provider to keep technology operations running smoothly, not the client. Good managed service providers will aim to become an extension of your business, not just the part-time "IT guy."

Managed services programs are designed to support your business through effective investment in and management of technology. Many managed service offerings include, but are not limited to, the following services:

- **Firm Technology Planning** – on a semi-regular basis, your managed services provider should meet with you to review budgets, inventory, and planning to make sure you have a comfortable understanding of what your IT budget and plans will be for the upcoming months, quarters, and years. In addition, on an ongoing basis, all technical documentation and vendor contact information should be updated at this time.
- **Help Desk Support** – full service managed services providers should provide an immediate outlet for support for technical issues both minor and major. The goal is to get your employees back to work as quickly as possible.
- **Remote Network Monitoring** – most managed services providers will provide network monitoring services to set capacity notices to notify you of any impending storage/space issues that may arise. This also allows for technical updates and patches to be made in a timely, continuous, and secure manner.
- **Anti-Virus/Spam Protection** – as managed services providers bundle more and more services in their offerings, you as the consumer stand to gain. Many providers will install anti-virus software to all computers under support, thus eliminating additional costs for their clients. This deployment allows managed services staff to support all clients in a similar and cost-effective manner, savings which can ultimately be passed along to your business.
- **Local/Offsite Data Backup** – we all know the importance of solid data backups that are tested, tested, and tested again. Competent managed services providers will work with each individual

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client to determine the best local and/or offsite backup solutions for the individual practice. Decisions about what backup solutions to deploy should be made based upon cost, feasibility, and disaster recovery planning and needs. Make sure your provider's backup program includes both file level backup and imaging components as part of the regular backup and that it is tested for you to see.

- **Remote Access** – many managed services providers have the ability to offer their clients remote access capabilities through the same monitoring agent used for support. An important goal of any managed services program is to have employees work from anywhere (home, hotel, conference center, etc.) just as they would at their office desk.

- **Vendor Management** – your contracted managed services provider should become your single point of contact for all technology needs. This includes dealing with all third party vendors, whether it is Dell, HP, Apple, your internet provider, tax and accounting software providers, etc. This creates a couple of benefits to you; first, your managed services provider represents you and can eliminate a lot of the finger pointing that goes on from a technical perspective. Also, your provider can save you and your staff important time chasing down vendors that can be better spent addressing your firm needs.

- **On-site Visits** – if technical issues cannot be addressed remotely, your managed services provider should offer service plans to include on-site support. Forward-thinking managed services providers will also visit their clients on a regular basis to ensure support relationships are moving in the appropriate direction and to ensure all staff are comfortable working with the managed services provider.

Good business is about having partnerships that extend beyond traditional service and vendor roles. You need your technology to work for you, not against you, so that it is easier for you to conduct business. In today's fast-moving business world, **you need 24/7 reliability** – that's why you invested in technology in the first place. **You also need dedicated and focused professionals familiar with your business** with up-to-date expertise working for you to make sure that your technology ROI is maximized at every opportunity.

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