



Integrating Your RMM and PSA Tool:

Your Path to Proactive
Managed Services

eBook



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Managed services providers (MSPs) come in all shapes and sizes. Many start out offering break/fix services—when someone's IT breaks, these IT service providers try to fix the issue. This is a purely reactive model. On the other end of the spectrum are businesses providing fully managed services. These businesses place customers on recurring contracts that include ongoing maintenance and monitoring. This is a proactive model. Most MSP businesses offer a combination of both break/fix and managed services contracts.

There are major benefits to landing on the proactive end of the spectrum. As a result, many MSPs try to add more managed services customers to their client roster as they grow. However, this isn't simply a matter of selling to clients and winning more contracts—MSPs also need the right tools to serve these customers (and efficiently manage the business at the same time). If you want the right tools in place, you should start by looking for an RMM platform that integrates seamlessly with a solid ticketing or PSA solution.

Before we talk about that, let's look at the different business models and reasons why many prefer proactive services.

Reactive, Proactive, and Hybrid

REACTIVE

In a reactive model, employees in the MSP business spend most of their time responding to customer requests. This typically happens when things go wrong (often known as break/fix services). People in these businesses have to be comfortable with putting out fires. Owners often can't predict their day-to-day schedule, let alone their month-to-month activities.

Some of the downsides of this include:

- You must wait for customers to contact you before you can charge
- Billing is time-based
- The workload—and therefore, scheduling—can be unpredictable

Many IT service businesses begin with this model. It can certainly work if you're a one-man shop. It may even work if you have a couple employees. However, if your work remains in reactive break/fix services, your workload can quickly grow difficult to manage and organize.

PROACTIVE

In a proactive model, MSPs work with customers using a recurring managed services agreement. In this case, the MSP proactively monitors for issues and tries to remediate them before customers are even aware.

Proactive programs are designed to allow you to:

- Better predict revenue
- Get to know customers and their environments better (which can help increase customer loyalty)
- Provide better service through ongoing monitoring and maintenance
- Plan ahead for technician utilization and scheduling

HYBRID

Over time, many MSPs look to move toward a proactive, fully-managed model.

A hybrid model is where MSPs have a mixture of proactive (managed services) and reactive (break/fix) clients. Most MSPs fall under this category. However, many MSPs look to maximize their proactive clients and reduce the proportion of reactive clients.

The truth is, offering proactive services is about more than just landing more managed services contracts. You also need to deliver both in terms of your technical solutions and your ability to organize your business.

That's where the tools you use come into play.

What runs your business?

Let's say you're sold on becoming more proactive. If you use a patchwork of solutions to manage your business, things can get overwhelming fast. You need to implement the right tools. Let's look at a few options.

NON-SOFTWARE TOOLS

If you're on the reactive side of the fence—especially if you're a solo shop early into your MSP business—you may use non-software tools to track a significant amount of information. You may even keep notes in notebooks or on legal pads. Unfortunately, this information can prove hard to organize, and papers can easily become lost.

NON-TICKETING SOFTWARE TOOLS

Many businesses rely on using software tools that simply aren't designed for issue tracking. For example, you may keep customer information in email. This is certainly better than pen and paper, but information can still be difficult to track down and share. Plus, your customer-related information will get mixed in with non-business-related email, potentially adding further confusion. The average email user receives 72 emails per day¹. That's a lot to keep track of.

What if you use Excel™ or online spreadsheets to manage your customers or track time? This can work, but it offers little in the way of automation. This lack of automation can introduce human error and create more work for you and your technicians in the long run.

¹"6 Annoying Email Habits that Ruin Productivity and Destroy Trust," Inc. <https://www.inc.com/glenn-leibowitz/270-billion-email-messages-are-sent-every-day-heres-whats-wrong-with-many-of-the.html> (Accessed November 2018).

FREE TICKETING TOOLS

With free ticketing tools, you can at least track customer issues from one place. Team members can quickly look up previous tickets if they need to understand resolution steps. If you're starting out, free tools may be helpful. But even if you run a small operation and want to save money, it may be beneficial to consider what free tools could cost you, especially over time. These tools often lack important time-saving features. They can also be challenging to use and maintain; support is often negligible or non-existent.

BLOATED PAID TICKETING TOOLS

Once you start looking at paid ticketing tools, you're closer to having the right solutions for providing proactive services. Of course, paid doesn't necessarily mean good. Some tools on the market are more "bloatware" than anything else.

Let's say your focus is on flat-fee billing and ticketing. You might choose a tool with bells and whistles, like asset and inventory management. These tools can be a chore to configure, possibly making your team less efficient in the long run. Make sure to take full advantage of your trial before you decide on a paid tool.

The solution: integrated RMM and PSA tools

At some point, as you grow, you'll likely want to invest in a remote monitoring and management (RMM) platform as well as a professional services automation (PSA) tool. Odds are you already know what these two solutions are capable of, but in case you don't, here's a short refresher.

Remote monitoring and management

The term RMM can mean different things to different audiences. In general, RMM platforms are built to help you manage technology for a group of customers or users from a single, easy-to-use, centralized platform. If using a cloud-based RMM platform, setup can often be as simple as having the system push out a few agents to a group of devices.

Once you add your customers to your RMM platform, you can monitor devices for any irregularities off-site. If you find any issues—or if the system bubbles up any alerts—you can usually connect to that device to fix the issue without leaving your desk. Additionally, many RMM platforms come with integrated antivirus, backup, mobile device management, email protection, and patch management. A strong RMM platform will allow you to automate some of your tasks with scripts, and some even offer drag-and-drop automation, where you can create new workflows without learning a scripting language (or hiring a PowerShell® guru).

Professional services automation

Some people aren't familiar with the term PSA. PSA tools take the concept of ticketing and blend them with additional functions, like billing. Managing a team of technicians can be tough—allowing a PSA tool to streamline things can lift some of the burden. A good PSA tool will often mix:

- Ticketing
- Time tracking
- Billing or invoicing
- Knowledge management (such as basic setups and procedures)
- Technician management, including scheduling
- Reporting

PSA tools are designed to help you standardize your processes, improve efficiency, and reduce errors. Additionally, through reporting, many PSA tools can also help you make smarter business decisions. For example, if you find one customer takes up significant time and drains your profit, you can decide whether to put them on an hourly contract or cut them loose.

Integrated RMM and PSA: a single pane of glass

Earlier, we spoke about the importance of being proactive. Automation is essential if you want to offer proactive services at scale. It not only helps you respond to issues quickly, but it can also free your team up for other projects.

That's why you should choose an RMM platform that easily integrates with a PSA tool. It can automate several steps in your workflow while allowing users to create and edit tickets without switching systems. In this situation, the PSA handles the business side of the house, while the RMM tool handles the technical side.

Here's how a typical issue could flow with an integrated system:

- An alert is triggered in the RMM platform
- Relevant data gets sent to the PSA system
- The PSA system creates a ticket
- The system automatically triages and routes the ticket
- Your technician works on the issue
- The technician can update the ticket with relevant notes or close the ticket from their RMM solution

As you can see above, the two systems automate much of the process of discovering issues and tracking technicians' time. However, the benefits extend beyond the issue remediation process.

GREATER KNOWLEDGE SHARING

You never want one technician to hold all the knowledge for a customer. As a technician works on an issue in their RMM platform, they can add documentation to the ticket without leaving the system. This is meant to encourage adding information on the fly, increasing knowledge transfer across the team. If an employee leaves or goes on vacation, you will want to have the technicians' notes handy. An integrated system can potentially increase the odds that you'll have the information you need when you need it.

REDUCE APP SWITCHING

Switching between systems can increase the risk of human error. For example, a technician may forget to document their time spent on the task (especially if they rely on pen and paper for time tracking) or they may not capture enough relevant details in the ticket. When you hook up your RMM and PSA tools, you create a single, centralized data repository accessible from both platforms. This can help reduce the amount of switching between applications, thus helping improve productivity.

Beyond that, when employees don't have to switch from one system to the next, they can be far more productive overall. According to a study of over 2,000 workers, more than two-thirds of respondents claimed they lose up to an hour per day switching between business applications². When you reduce the amount of software switching via integrations, you could potentially see a tangible increase in output from your team over time.

STREAMLINE BILLING

At the end of every month, you will have to bill for your time. This can become a week-long nightmare if you don't have the right data and reports. An integrated RMM and PSA combination can potentially help reduce the time needed for this task.

Let's say you mostly run flat-fee billing. Your RMM system knows the number of workstations and servers you manage. This information can be sent to your PSA tool to allow for more accurate billing. This is a no-brainer for businesses with many managed services clients. If you fit into the hybrid model, as most MSPs do, integrating these two solutions lets you easily bill your managed services clients alongside your break/fix clients.

Additionally, many solutions let you generate batches of invoices at once, which can further streamline the billing process. The system can't handle everything—you still need some human intervention. However, this can help reduce your overall time spent, allowing you to focus on providing more value to customers.

²"From Workplace Chaos to #WorkZen," RingCentral. <https://www.ringcentral.com/us/en/blog/from-workplace-chaos-to-workzen> (Accessed May 2021).



Efficiency across the workflow

If you want to offer more proactive IT services, efficiency is an absolute must. Proactive business models can require more hands-on attention than reactive break/fix models do. If you want to support these types of customers at scale, you will need to accomplish more without overloading your workforce. An integrated RMM and PSA system can help you save time, reduce waste, and decrease human error. This can help you take on more proactive clients, and ultimately, impact the bottom line at the end of the year.

N-able™ RMM integrates natively with N-able MSP Manager. From a single pane of glass, you can discover and manage customer issues, create and track tickets, and more. Find out more at n-able.com.

About N-able

N-able empowers managed services providers (MSPs) to help small and medium enterprises navigate the digital evolution. With a flexible technology platform and powerful integrations, we make it easy for MSPs to monitor, manage, and protect their end customer systems, data, and networks. Our growing portfolio of security, automation, and backup and recovery solutions is built for IT services management professionals. N-able simplifies complex ecosystems and enables customers to solve their most pressing challenges. We provide extensive, proactive support—through enriching partner programs, hands-on training, and growth resources—to help MSPs deliver exceptional value and achieve success at scale.

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