Using Documentation to Boost MSP Efficiency and Drive Profitability

Whitepaper

N-ABLE™
Your best technician walks out the door. They’ve accepted a position for another MSP, and unfortunately, you can’t afford to keep them in-house.

At first, you don’t have any issues, but a few weeks later, one of your customers experiences an outage. You put the next senior-level tech on the job, and they fiddle around with a network device. They work directly from the standard operating procedures for your company—but once they fix it, something else in the environment breaks down.

It turns out, the network device was set up using an odd configuration; and the only person who understood why things were set up that way no longer works for your company. It takes the new technician hours to figure out the full environment’s architecture and resolve the issue—all while your customer sits around, growing increasingly fed up. This type of situation may even cause them to find a new provider once your contract with them expires.

Today, we want to talk about the importance of consistent documentation. When you have a uniform method of documenting elements of the infrastructure at each customers’ site, your technicians’ lives get much, much easier.

The value of consistency

Unfortunately, in most organizations, if you lack a consistent, enforceable system for documentation, you can end up with wildly varying results. Even with strong standard operating procedures (SOPs) requiring techs to keep detailed notes and logs, people may not document to the extent you need—some people write novels while others might stick to a few words.

More consistent documentation helps almost everyone. This requires automating as much of the documentation as you can. Plus, you want to be able to easily link all your information, like domain and SSL certificates, asset information, and warranties in one central location. Here’s why it matters for the business.

FASTER RESOLUTION TIMES

When issues arise, customers want them fixed fast. Even with forgiving service level agreements (SLAs), you still want to beat them as often as possible.

Consistent documentation helps technicians solve issues much faster. By integrating your documentation system with your RMM solution, you can automate a significant portion of the documentation process. This means teams can jump in, know what they’ll expect to see on the documentation, and trust that it’s accurate—helping them solve issues far more quickly.
CONSISTENT SERVICE DELIVERY

Some MSPs rotate technicians on accounts, while others keep one technician per account. Even if you rotate technicians, customers sometimes develop a fondness for specific technicians. It’s not always about ability; sometimes, they just “click” with a particular technician, or they have one outstanding interaction with someone and don’t want to switch. If someone works on an issue and it isn’t their preferred tech, they already have a mark against them. If they take a while to fix an issue or introduce a new error because they don’t know the environment well and the documentation is poor, this bad interaction could lead to undesirable consequences for your business.

With strong, consistent documentation, you can rotate technicians across accounts without as much concern. As mentioned previously, when technicians know what to expect—and can trust the information is accurate—they can get to work quicker and confidently solve problems. This leads to more consistent service, which helps reinforce your brand and reduce concerns when a new technician tackles an issue or visits a site. It can even foster stronger relationships between technicians and the customer. If the new technician works just as quickly as the old favorite, they may overcome other negative perceptions. Ultimately, you want your customers thinking you always bring your “A” team to their organization.

FEWER TROUBLESHOOTING ISSUES

Most MSPs would love a world where each customer is set up exactly the same way—where they can walk in, make a change to one specific device, and know that it won’t break anything else.

Unfortunately, that world doesn’t exist. Some customers have edge cases. Others have invested in specific technologies they don’t want to part with (or can’t until their contract expires). And some have employees with atypical tech needs. It just happens.

It’s important to stick to an overall plan as much as possible. But if you have to support an executive who needs to jump through additional hoops to access their data when working offsite for security purposes, it’s best to have those details noted so people don’t remove security controls that might seem unnecessary. If you have consistent documentation, customers can trust the unusual setup was deliberate and avoid making changes that could break other parts of the environment. Or you could manually add documentation about the configuration so techs know what not to do. Ultimately, fewer troubleshooting issues means fewer frustrated clients.

BRING NEW TECHNICIANS UP TO SPEED FASTER

It takes time to get acclimated to any job. When businesses hire someone, they expect that person to operate at a lower capacity until they can contribute fully to the team. Documentation consistency and consolidation can help new team members become productive more quickly.

For example, if there's an issue with a software package—like QuickBooks®—on one machine, they can search for other machines running QuickBooks without issue and see if there are differences between them. From there, they can start to piece together a solution, assuming QuickBooks and the machines were linked in the documentation system. If they had to go searching between multiple systems—like their RMM system, SharePoint®, and Confluence®—
they not only lose time fixing the issue, but may also miss an important piece of the puzzle if they don’t know all the places to look.

**ONBOARD NEW CUSTOMERS FASTER**

Let’s say you’re pitching a potential new client but they have another person pitching them at the same time—you’re unwittingly in a bidding war with the rival MSP. All things being equal, if you can onboard the customer more quickly than the competition can, you’ll likely win the deal.

When you have a consistent process documented for onboarding new clients with standard operating procedures anyone can follow, you can get customers up and running much more quickly. This helps you avoid hiccups early in the relationship and allows you to impress them with your professional ability to handle anything that may arise.

**What to look for**

So how do you find the right documentation solution for your MSP? Look for the following:

- **Automation and integration:** Make things easy on yourself by choosing a tool that integrates with your existing RMM solution. If something changes on an asset in your RMM tool, for example, it should automatically update in the documentation solution. Few people enjoy manually updating documentation, particularly when they’re busy or tired from completing their most recent task. Integrated tools take some of the load off, and help ensure documentation consistently remains up-to-date.

- **Consolidation:** Look for a solution that links together the information your technicians need to solve an issue. For example, find a tool that can link together asset information, SSL and certificates, knowledgebase articles, and passwords in one location. Doing this lets your technicians get what they need and solve issues faster.

- **Versioning:** Your documentation management system should also provide you full visibility into version histories. Since IT is often a game of investigation, version control helps you track changes to assets so you can find where issues may have started occurring. In short, it can automatically populate your maintenance logs.

- **Built-in security:** There has been an increasing number of cyberattacks against MSPs. Hackers know that getting access to one MSP can lead to open season on customers. To keep your customers safe, you need to protect everything—including documentation. If a cybercriminal breaks into your documentation system, they could walk away with blueprints for compromising your customers’ systems and stealing valuable data. Make sure any documentation management system you buy includes security safeguards, like multifactor authentication, encryption at rest and in transit, and storage in secure data centers.
About N-able Passportal + Documentation Manager

N-able™ Passportal™ + Documentation Manager is built to help boost your team’s efficiency and drive profitability by consolidating your documentation and passwords within a single platform. It integrates with several RMM platforms, allowing you to keep your documentation current and consistent. Plus, it includes multiple security safeguards, including multifactor authentication and robust encryption, to help keep your customers’ information safe from cybercriminals. Learn more today at passportalmsp.com/msp-documentation.

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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