If It’s Not in ConnectWise, It Didn’t Happen
How to Eliminate the Chaos and Gain Total Control of Your Business

A guide for software companies
The software market is expected to enjoy its best growth in a decade

How can small software companies prepare themselves to capture market share?

After the financial crisis struck in 2008, businesses and government investments in software came to a halt. Today, with increased profit and a desire for streamlined processes, businesses have greater demand and investment available for software solutions, creating new opportunities for growth for software providers. Forrester Research predicts that small software vendors have the potential to grow faster and capture a bigger share of this software spends away from the large vendors. With today's highly competitive marketplace, having a single solution that effectively manages all facets of your business can put you one step ahead of the competition.

- Forrester Research “What CEOs of Small Software companies Need to Do in 2011”

If It’s Not in ConnectWise, It Didn’t Happen

Disparate systems can make it difficult to support customers, manage service level agreements (SLAs), and ensure timely contract renewals. This eBook examines how many successful companies use ConnectWise to eliminate the chaos and tie together all the components of their business, provide more value to customers, and maximize profitability.

At ConnectWise, we tell our customers “if it’s not in ConnectWise, it didn’t happen.” Discover how software companies like you use our professional services automation (PSA) solution to gain complete control over business processes and achieve success with a total 360° view of day-to-day workflows and results.
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Have you ever discovered a customer issue that’s been sitting untouched for days or weeks?

The customer is furious …now what do you do?

Customer issues can come in from many different sources like email, phone, chat or your online portal. It can be difficult to keep track of them all and practically impossible to get control of when and how they are resolved.

Successful software companies rely on the timely handling of customer support issues. It is critical in maintaining service level agreements (SLAs) as well as providing high levels of customer satisfaction. By streamlining and improving operational efficiency with ConnectWise, you can manage more tasks with limited resources and increase profitability.

70 percent of businesses identified operational efficiency as very important to the success of their company.

81 percent indicated that operational efficiency was a difficult objective to accomplish.

2012 CompTIA Managed Services survey
Maintaining SLA Metrics Without Adding Staff

Using a powerful automation tool like ConnectWise, you can keep track of everything that happens in your business. Every customer issue can be turned into a ticket, which is tracked all the way through resolution. Using audit trails and response time measurements, you’ll have all the information you need in one system to evaluate the issue resolution process and report on SLA metrics.

Adding integrated chat functionality, ConnectWise further increases support efficiency by enabling technicians to simultaneously assist multiple customers. Get the tools you need to grow your business without having to add more staff.

425% productivity improvement

Contact centers appreciate chat functionality for its cost efficiencies and gains in productivity. Phone agents typically handled an average of 2.7 customer calls per hour, while a chat agent can handle an average of 11.5 chats per hour. This is a 425 percent improvement in productivity.

Forrester Research’s North American Technographics survey

If it’s not in ConnectWise, it didn’t happen.

Everything can be a ticket, simply define your process and see it through to completion:

- Create and maintain an updated list of services you offer from support, maintenance and professional services to proactive service management and IT consulting
- Determine your service types and service teams
- Assign service boards for each team
- Define the processes needed to resolve a ticket
Some businesses waste too much time and resources trying to put out fires.

Whether it’s a support issue that fell through the cracks, missing SLA metrics, or letting a contract expire, all of these problems negatively affect customer satisfaction and profitability.

Standardizing service workflows – the process from first call through issue resolution – and automating communication with customers can help distinguish you from the competition. With role-defined workflow rules, you can automatically notify or escalate issues to the appropriate person and increase your team’s productivity.

Putting issues and processes in ConnectWise eliminates the chaos and ensures that everything gets done the way you want, when you want. For example, with ConnectWise you can automate repeatable processes to increase efficiency and success:

**Support ticket status.** Define internal and external notifications to be executed when a support ticket is changed to a specific status. This saves the service team time by alerting the appropriate people about an issue, without having to remember who needs the email.

**Renewing support contracts.** When a contract reaches a certain age or date, ConnectWise automatically notifies appropriate employees to begin a documented process to renew the customer.

**Automated notifications.** You can acknowledge receipt of a service ticket based on email or customer portal submission and announce service level milestones.

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**Statistics**

“(We) have improved our efficiency at closing tickets by as much as 25%!”

-Dave Brewer, President, BC Networks, Inc
Get the results you want from your business

ConnectWise ensures that you provide a smooth, continuous process for your customers – from sales through implementation and support. You can create unique agreements for every customer to track items like service hours and implementation times. Plus, you’ll gain real-time visibility of business health with built-in dashboards that help you track key performance indicators and proactively manage your business.

93% customer service is a top priority

“93 percent of respondents said customer experience (CX) is on their company’s list of top strategic priorities. For 28 percent, it is the top priority. We’ve shown through both mathematical correlations and actual company scores that when your customers like the experience you deliver, they’re more likely to consider you for another purchase and recommend you to others.”

-Megan Burns, Forrester (http://blogs.forrester.com/megan_burns)

Use automated workflows and notifications to provide timely updates on upcoming contract renewals, service level milestones, and support ticket status.
How many times has project information been misplaced or lost at your company?

Do you know how many billable hours you lost as a result?

Keeping track of paperwork can be cumbersome. But losing out on profits is downright painful. Best practices in project management require two essential elements: collaboration and coordination. ConnectWise gives you the power to assign tasks and track progress. Best of all, it delivers full visibility into project details so you never have to worry about lost information causing delays or inaccurate billing again.

With ConnectWise, projects happen. You can track tasks for new customer implementations ensuring a smooth, professional process from the beginning. Once a sales opportunity is won, workflow is triggered that starts the implementation process. You can define activities for each stage and monitor progress to ensure any changes or add-on work is documented and customers stay happy.

Quick Tip:
Use service boards in ConnectWise to view tickets by customer. From there, you can compare time spent on each account to contract values so you can determine who your “best” and “worst” customers are.
It’s not enough to get the sale.

It is critical to capture information for pipeline reports and provide professional, accurate quotes that are on the same page with accounting.

All too often, the sales team completes quotes on a case-by-case basis without being documented. The process can be disjointed at best and cost the company money in lost productivity, late and unprofessional proposals, and inaccurate figures.

ConnectWise gives you access to real time pricing information so you can provide fast, accurate quotes to customers. You’ll slash quote preparation time with a repeatable, engaging process that delivers attractive, on-time proposals to customers electronically. You can even give customers the ability to accept and pay quotes online, significantly reducing the time to order. Best of all, your quotes are integrated with the entire procurement and accounting process ensuring success from beginning to end.

It’s not enough to sit down with a customer, offer sound advice and great customer references. You need to follow up rapidly and seal the deal with a compelling proposal.

—Joe Panettieri, Talking Cloud
Creating a scalable quoting process

One software company shared their story about their quoting process before ConnectWise. They were experiencing rapid growth that required an efficient sales team to maximize on their market potential, but the sales quoting process was lagging behind. A time-consuming, centralized process for creating sales quotes was to blame. At critical times—like the end of each month or quarter—quotes piled up as the administrative team struggled to accommodate higher demand. Everyone was frustrated—including customers who had to wait up to two days for a quote.

ConnectWise put the power of generating quotes in the hands of the sales people. Quotes that took 2 days to prepare now take only 15 minutes and the company had a new streamlined process that shortened the sales cycle by 40% and registered a 25% jump in the sales close rate. “We could not have grown at the pace we did without ConnectWise,” remarks the CEO.

Quick Tip

Establish an integrated quoting process to ensure accurate, on-time proposals that make a great first impression and win more business.
Your business will never be truly profitable if you can’t get accurate invoices out the door.

From the hours it takes to track down professional services performed and calculating billable time to importing information into your accounting system, invoicing can be a lengthy process. Even worse is the feeling that you might be overcharging a client or leaving money on the table.

ConnectWise puts important financial data at your fingertips and ensures customers receive accurate invoices. It integrates project and ticket information with your accounting system making it easy to track billable tasks and hours, expensed items, and workflow. With ConnectWise, you can automatically generate detailed invoices so customers receive invoices faster than before. Plus, you’ll get paid faster with online and credit card payment options.

**Statistics**

It has been said that even with flawless billing processes, businesses need to keep track of work hours on a daily basis to prevent losses. For example, if employees report work hours at the end of the week, the organization suffers a 15% profit loss. Compare this to employees reporting work hours at the end of the month with the organization suffering a 30% profit loss. Revenue leakage occurs because employees don’t recall work activities correctly and allocate billable hours as non-billable hours. That’s a direct hit to your bottom line.
Integration Provides Control of Cash Flow

As CEO of a small company, Inland Productivity Solutions, Eric Hanson increasingly noticed that healing his customers’ ailments was far less daunting than running an efficient business. As the business grew, invoicing customers became much more time consuming than it should be. Disparate systems made information sharing tough.

Inland turned to ConnectWise to integrate and automate their business functions. Now Hanson can track actual and work-in-progress hours against invoiced hours, support exception write-up or write-down, and many types of billing arrangements. With ConnectWise, Inland can easily and accurately measure performance and report results to customers.

Quick Tip

Use the account on hold feature to keep your support team up to date on client account status and ensure you get paid before new work is done.
Marketing communications is one of your company's most important activities.

Yet it is easy to forget about when you are focused on providing top-notch services to your customers. Gain control of your marketing efforts. You can rely on ConnectWise to coordinate your marketing communications and help you reach your target audience with the right messages at the right time. If you put it in ConnectWise, it will happen.

With built-in email marketing, you can automatically send electronic communications to customers any time your company has something to share. Integrated with customer history, you can send messages about new products or services, upcoming industry events, and milestone announcements. ConnectWise can also provide you with automated notifications that inform you when messages are delivered and received.

**STATISTICS**

$41 ROI on email marketing

The Direct Marketing Association found that the return on investment for email marketing is still about $41 per dollar spent. More businesses than ever are turning to email marketing as a main vehicle for marketing communication.

Forrester Research’s North American Technographics survey
68% of respondents said they expect higher customer engagement to lead to increased sales. Firms expected at least some of those increases to come from existing customers who, when more engaged, make more frequent purchases.

Email is cited as the most effective channel among B2B marketers:

- 59% say email is the most effective channel for generating leads.
- 88% say they are using email marketing as a branding channel.

- Forrester Research

Quick Tip

Send regular communications to potential and current customers to keep engagement high and ensure your business is top of mind.
Conclusion

ConnectWise integrates key business processes so you can achieve greater accountability, operational efficiency, and profitability. Remember: If it’s not in ConnectWise, it didn’t happen. A powerful centralized system, ConnectWise makes sure everything gets done in a timely, professional manner. ConnectWise brings all aspects of your business together with the real-time collaboration you need for increased insight. ConnectWise provides the support you need to succeed today and well into the future:

- Increase profitability by automating common tasks.
- Improve cash flow by better tracking billable hours and managing employee work and resources wisely.
- Enhance service levels and customer satisfaction with accountability in your service level management.

“ConnectWise was critical to literally doubling our labor revenue—with the same number of employees. It connected people in the business process and gave us a way to tell customers what we did for them.”

- Larry Shulman CEO, LMS Tech Services

About ConnectWise

ConnectWise is the leading business management solution for software companies, integrators, VARs, service providers, technology consultants, and developers. Today more than 65,000 Technology professionals rely on ConnectWise to achieve greater accountability, operational efficiency and profitability. ConnectWise fully integrates CRM, sales, support ticket and tracking, project tracking, IT service management, SLAs, dispatch scheduling, mobile IT services, time and expenses into a singular IT management software to dramatically streamline Technology companies. Over the last 30 years, ConnectWise has become the premier business operating system for solution providers. ConnectWise APIs are accessed by over 300 organizations, including ConnectWise partners and industry leaders of the IT Nation. For more information visit www.ConnectWise.com or call 800-671-6898.