



CONNECTWISE TIPS FOR MSPS



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In order to be competitive and achieve long term success MSPs need to attain complete control and transparency in its processes. They need to make sure that every incident, no matter how chaotic can be controlled with tried and tested processes. The only way to do this is to learn from past experiences. ConnectWise is a great tool that lets you catalog incidents and update tickets as they happen giving the MSP a look into what is happening with the incident, what was done in the past to resolve it and what can be tweaked to speed up the processes.

With ConnectWise MSPs are now able to change their traditional break-fix philosophy to one that involves being prepared. But is that enough? If clients see you only as a provider of hardware, fixes and solutions and not a trusted advisor, then the relationship is limited in terms of its growth and its potential for profitability.

This whitepaper is written based on our conversations with numerous MSPs who use ConnectWise and have left us with some pearls of wisdom on how to use the ticketing tool for seamless and profitable incident management. From using ConnectWise to get the most out of it to simple enhancements, we cover simple but effective techniques that you'll be using on a daily basis!

TIP 1 – AUTOMATE AS MUCH AS YOU CAN

When you automate workflows there is very little room for error and it speeds up the processes of incident management.

SET NOTIFICATIONS FOR SERVICE TICKETS

When a service ticket is created and updated it is imperative that notifications be sent to the concerned people on the service team so that they can be aware of the incident taking place. Engineers can even refer to past notifications at any given point as a reference. By automating the notification you save the service team time and avoid having to individually route notifications to the people on the service team.

If you want to take this one step further you can use a 3rd party critical alerting tool that seamlessly connects to ConnectWise through the service desk and intelligently routes alerts to the right person.

SET ALERTS ESCALATION

All alerts sent out through ConnectWise stops being effective if the recipient of the alert is unavailable or unable to get to the incident. If faster incident resolution is the goal then the automation of alerts to escalate to another recipient must be a part of the plan to combat a critical incident.

Automation of alert escalation is something that ConnectWise doesn't provide but third party applications added to the service desk would eliminate the need to send out alerts manually to a list of individuals responsible for an incident.

Using a third party application to automate the alert also eliminates human error and quickens the process of contacting the right person if the initial alert is not acknowledged. Ideally the tool used to automate the alert should have customizable parameters like the interval of time between escalations and the action that begins/stops the escalation of alerts.



Imagine having to manually call a person on your team or calling the office or the operator to make sure the emergency was handled by someone else if you can't get to it. This is a time consuming and unnecessary process. With a tool that lets you automatically assign and set up escalations you no longer have to make that call or worry that the incident isn't going to get resolved if the alert leaves your busy hands.

SET AUTOMATIC TICKET UPDATES

A key component of cataloging the incident resolution process is to ticket every step of the way. This allows you to track the progress of the event. Ideally, any third party application you use should automatically update the ticket. This eliminates human error, saves time and provides for almost immediate updates.

If you choose to make these updates available to your clients imagine how relieved they would feel knowing that the incident is being taken care of and that it is being worked on. In this kind of customer service, assuring your customer that you have a handle on things helps build their confidence in you.

AUTOMATE THE NOTIFICATIONS TO CLIENTS

As your team works away at the incidents it is important to keep your clients notified. Depending on the triggers you set you can customize the notifications to go out to those who want such information on the client's side. Not only are they kept updated but they are also assured that your team is actively working on the incident.

TIP 2 – SCHEDULE RECURRING TICKETS

We have now automated the process of capturing and dispatching tickets and this will increase the productivity of your service team. But what about recurring tasks? With ConnectWise you can automate regular tasks that deal with documents, finance, configurations and more, plus schedule the right resources to make sure these important client maintenance tasks are completed on time.

In addition, you can create a standard service template for one-off tickets that you know will occur frequently such as workstation and server installs. With these templates in place, tickets can be created and entered into the system quickly, ensuring you capitalize on important revenue opportunities.

According to a ConnectWise blog¹:

“Bid adieu! to ticketing déjà-vu. When a familiar request comes in from a client that you’ve already handled for a different one, just copy the entire previous ticket (tasks, configurations, documents, and all), and save yourself the headache of recreating the wheel, or in this case, the ticket.”

TIP 3 - GET ENGINEERS TO UPDATE TICKET STATUS

The team involved with the incident are the best people to update tickets but busy engineers tend to defer updating the ticket status and often wait until they are finalizing their notes and have fully resolved a ticket. Try to make it easier for engineers to provide updates and encourage them to do it sooner in the issue resolution

¹ <https://www.connectwise.com/blog/see-feedback-in-action-2016-5/>



process. For example, limit the number of status selections for a ticket that follows the normal path and provide a clear, concise description for when to use each status.

If you are using a critical alerting tool in an app form that can capture responses of the engineers working on the incident, they can use their smartphones to respond to the ticket which eliminates the need to get into ConnectWise and input these ticket updates.

ConnectWise² urges you to make sure you explain to your team why it is important to your business that timely status updates are available both to the client and the service team. Effective communications to the client via a portal or email notifications will result in fewer calls requesting updates. With a service management solution, management can gain visibility of tickets that are getting stuck in the queue and take appropriate action.

BONUS TIP - USE A DIGITAL ON-CALL SCHEDULER

While you can create triggers that send out tickets as alerts based on the conditions set in ConnectWise. It gets cumbersome when you are unaware of who needs to get notified, especially if the people who usually get notified work in shifts or are on-call on certain days of the week.

The solution to this is to use an intelligent on-call scheduler that lets you group people in a schedule, according to their working times and availability. In this way all it takes is one trigger from ConnectWise that sends the alert to the group in the intelligent on-call scheduler and the on-call scheduler assigns who needs to get the alert based on the schedule fed into it.

CONCLUSION

The key to incident resolution through ConnectWise is to find a critical alerting tool that lets you differentiate alerts, automate the process of escalating alerts to the next person in charge and schedule people in a digital schedule that manages who gets the alert based on the days of the week and the time of day.

ABOUT ONPAGE

OnPage is a cloud-based, industry leading smartphone application for high-priority, real enterprise messaging. The OnPage application addresses the need for HIPAA compliant, incident response management and secure, time-sensitive messages.

OnPage takes mobile communications to the next level with the latest all-in-one app features. The web-based on-call scheduling tool enables enterprise users to plan ahead and route prioritized messages to the right person, at the right time, every time.

Thousands of healthcare providers, doctors, field engineers, law enforcement, nurses, emergency responders and disaster recovery teams depend on OnPage for rock solid reliability every day.

TO LEARN MORE, VISIT OUR WEBSITE OR CALL: [ONPAGE.COM/CONTACT-US](https://onpage.com/contact-us) **781-916-0040**

² http://university.connectwise.com/content/documents/whitepapers/cw_wp_newservice.pdf