

### Introduction

As a technology business today, service is what sets you apart from the competition. Creating a great service experience starts from within. Here are some of the best practices we've found create efficiencies and set your service team up to provide consistently excellent service.

When information is stuck in different silos, it's easy to misplace customer requests. Using a platform like ConnectWise, tracking all communication in one system keeps everyone informed and ensures nothing falls through the cracks.

### 1. Everything is a Ticket Ticketing systems

Everything is a Ticket Ticketing systems are a great way to document all requests and hold your team accountable. We believe that anything that requires working on, anything actionable, should be a ticket. Whether it's a client request or an internal task. The next time you go to send an email that starts with "I need you to do...",

### 2. All Roads Lead to Rome

Create a system that flows all service requests into one central location, no matter how it comes in – phone call, email, chat, customer portals, remote monitoring tools, etc.

### 3. Paint Tomorrow Green

If your employee utilization is under 75%, you're not maximizing your team's productivity. In ConnectWise, we flag any day under 75% scheduled in red. Now that everything is a ticket, all you have to do is schedule tickets on their calendar for tomorrow to paint it green

### 4. My Life is My Schedule

Creating a scheduling or dispatching process to Paint Tomorrow Green creates a rigid schedule for your employees to follow. Their life at work should revolve around their calendar. Enforcing this rule ensures they'll meet that 75% utilization

### 5. All Time, All the Time, On Time

Getting your employees to record their time is not an easy task, but not doing it can have severe consequences for your customers' experience AND your bottom line. We firmly believe that everybody in your company should track: - All time: (8 hours/day, 40 hours/-week, billable & non-billable) - All the time: make it a standard policy - On time: at the time of service, not on Friday at 5 o'clock

### 6. Automate Service Workflows

The one thing that can really annoy your customer is lack of communication. Don't make them call to find out the status of an issue. In ConnectWise, you can create workflow rules that automatically send your customer an email through the ticket.

### 7. Leverage Remote Monitoring

Today, most devices run off some sort of network that can and should be monitored. Using a remote monitoring and management (RMM) tool reduces the frequency of needing to send a technician into the field. So not only can you reduce the time it takes to resolve issues, but you can anticipate them before the customer even knows about it.



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