

The 2021

IT Services Buyer's Guide

Compiled for you by



THE **FULCRUM** GROUP
One Technology Solution: Yours

The 2021 IT Services Buyer's Guide

Chapter 1 - How everything changed forever in 2020

Chapter 2 - You've got a business plan. Do you have an IT roadmap?

Chapter 3 - Why business owners & managers switch IT partners

Chapter 4 - Protect the most important thing in your business

Chapter 5 - Why you should be highly skeptical of all IT support companies

Chapter 6 - What every IT support company wishes you knew about IT

Chapter 7 - How to help your internal IT people, if you have them

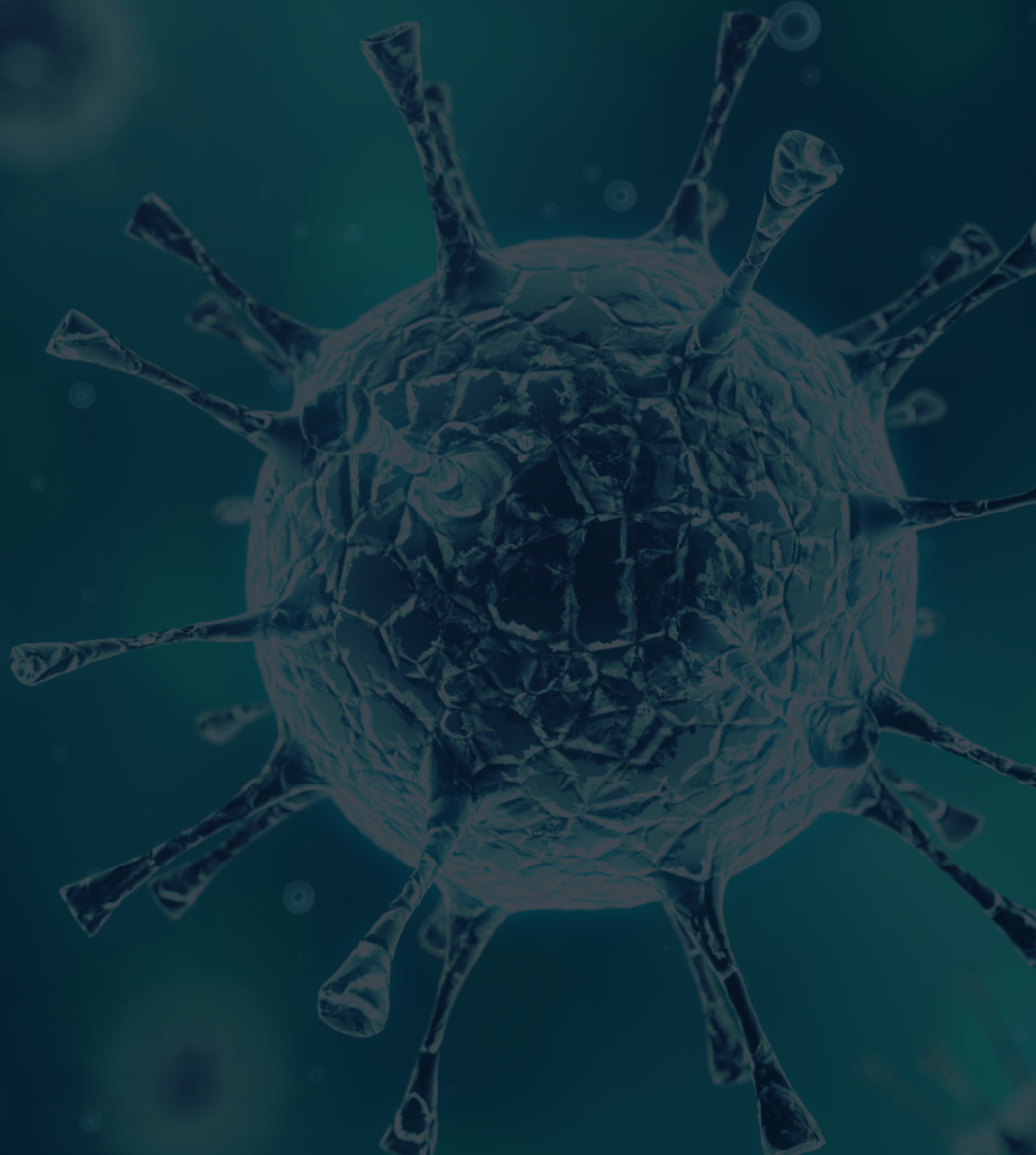
Chapter 8 - About us

Chapter 9 - What will typically happen during your first 90 days

Chapter 10 - What to do next

CHAPTER 1

HOW EVERYTHING CHANGED FOREVER IN 2021



Last year, everything changed for everyone, the world over.

Contact with friends, family and co-workers all became virtual. Masks became commonplace, and we developed a sense of germaphobia that we didn't imagine possible.

Hand sanitizer became the number one most sought-after product and was impossible to buy for a while - as was toilet paper, but let's not get into that now.

Not only did our personal lives change, but businesses had to adapt to a completely new way of working as well. And fast.

Because the Covid-19 pandemic meant that for the best part of the year, people were essentially confined to their homes. Employees were sent off to their home offices if they were lucky, or living room sofa if they weren't. Our homes became our workspaces and schools. And for some of us, the change to full-time or hybrid remote working has become permanent.

It's safe to say that the world of business changed in a big way. And it's unlikely we'll all go back to how it was before. If anyone can even remember how it was before!

That's no bad thing. In fact, it's becoming clear that Covid simply sped up a process that's been happening for years anyway.

As IT support experts, we've been telling our clients for years to make the transition to remote working, so that anybody can work on any device, anywhere. Fortunately, the majority of our clients had that infrastructure in place before March 2020. The forced move to working from home made them realize what a simple shift it actually was for their business systems to adapt around remote working.

I fully believe that we've seen between 5 and 10 years' worth of business technology change since Covid hit. And this will undoubtedly continue throughout 2021 and beyond.

There's been plenty of other change all around us.

Last year online shopping surged (no wonder Jeff Bezos is so happy right now) while brick & mortar retail declined. There's been a big change in travel and entertainment, too, because we simply can't have the same lifestyles that we did before March 2020.

Sadly, countless well-known brands have already suffered the effects and have gone under or are at risk of doing so this year.

Our government has spent trillions on relief packages for businesses and individuals. This help can't continue forever, which means that some businesses won't survive post-Covid.

Taking everything that has happened in the past 18 months, it seems as though we might be heading for a Great Recession.

For you as a business owner, this isn't necessarily something you need to be scared of. Recessions bring opportunities for many, and threats for some. But we should all certainly be aware of what's on the horizon.

This year, your business will need to mine value from absolutely everything it does. And one of the first, most vital areas to consider is your IT infrastructure, and importantly, your IT support partner.

The Covid lockdown last year showed a lot of businesses that their IT support partners were not partners at all.

When it came down to crunch-time, these IT support companies were just another supplier, with no real commitment to their clients. We've heard from companies whose IT support just disappeared in March, and in subsequent lockdowns afterwards.

Just when they needed IT support and expertise the most... BANG... into thin air they went. They were simply too busy, or too unprepared for such an event.

And getting an entire business setup to work from home is no small feat. Especially without the know-how. There is so much to consider, with cybersecurity being of vital importance. Businesses have been left exposed with huge data security holes because of a rushed move to remote working.

One thing that's been learned the hard way is the importance of good IT for a business. Because we've all seen or heard exactly how bad IT can disrupt – or even destroy – a business.

Devices are getting smarter and smarter and software is becoming more intelligent. We only need to look at the way we use our phones today compared to just 5 years ago to see this.

Data's becoming more transient and it's easier to access it on any device, from wherever you are. While this has endless positives, it also means that cybersecurity is increasingly more important.

Over the past few years, we've witnessed a huge rise in something called ransomware. I'll explain what this is in more detail later in the guide. But for now, know that you absolutely want to avoid it.

As everything I've talked about here evolves, our businesses and business functions become ever more reliant on good IT. Great IT support. And getting better results from IT.

Changing IT support partners is a hassle and we don't recommend doing it unless you have enough pain to make that switch.

Which is why it's important to read a guide such as this one NOW, before you're having IT pain.

I've written this guide to help you understand how a trusted IT support partner behaves, and what great IT support looks like.

I'll explain why we genuinely partner with our clients and refuse to become just another supplier. I'll also explain why it's critical that you put your IT strategy and cybersecurity at the very core of your long-term business planning.

If you're already experiencing IT pain, and you're ready to have a conversation with us now about getting better IT results, jump to chapter 11 to arrange a conversation.

CHAPTER 2

YOU'VE GOT A BUSINESS PLAN.
DO YOU HAVE AN IT ROADMAP?



When did you last update your IT Roadmap?

Hopefully it's something you've made changes to over the past 12 months, to take Covid into account.

If you don't have an IT roadmap, or if you haven't given it much thought over the last year, now is definitely the time to review and update.

If you use any technology in your business – whether that's something as simple as all cloud services, or it's a full blown network for 5 locations – a proper IT roadmap will be your best friend. It's the foundation to growing your business. It can mean the difference between surviving a time of uncertainty and thriving through it.

OK, there's a big chance I'm biased! But I cannot stress enough how important a well thought out IT roadmap is for any successful business.

Your IT roadmap should work alongside your business plan, detailing the ways your technology will accelerate progress towards your goals and objectives. It should take into account both long and short term targets and leave room for change where necessary (if nothing else, 2020 has taught us just how quickly we might need to adapt).

And while it's called an IT roadmap, it's not actually about your technology. Sure, you'll have plans for the technology and devices that you use, and those that you aspire to use in future. In reality, the roadmap is about your business, and how your technology can help align with your business goals.

A great starting point is to take a look at your current IT infrastructure. What works well, and what would you like to improve? As your business grows, will your technology grow with you, or will you need to look at new software, networks, and even phone systems?

Speak to the people working in your business. What do they think works really well, and what would they change if they could? Are there parts of your IT environment that actually hinder what you're doing? Could you save time if you switched over to different software, or if you could integrate systems (like sales and accounting)?

When you're working with an IT support partner, they will be able to help you identify the right hardware, software, and cloud solutions. They will make recommendations based on the way you work, and the ways you want to work. They should even be able to spot potential issues that you hadn't noticed and suggest more efficient ways of doing things.

An IT roadmap will help you to budget better, and keep you up to date with your technology refresh cycle. It'll stop those surprise costs and random expenses you didn't budget for. Like most business owners, I hate surprises!

It can seem a little complicated to do this yourself. But if you're working with an IT support partner, this is definitely something they should be delivering to you on a regular basis.

Now, more than ever, every spend needs to be justified. Every investment needs to work hard for your business. You want value for money from everything you do.

Getting reports on key IT metrics can help you make better decisions on where to make investments in IT, and let you know which IT systems are functioning well.

Your IT support partner should also get involved with regular strategic reviews. It's up to you how often you do these, but I would recommend at least quarterly you should review what's been accomplished in the past quarter, any changes to your IT roadmap, and any updates from you about the business. This leads to constant IT improvement and better IT results. Who doesn't like IT that just works?

And this is why I keep talking about an IT support partner. Not an IT support company. Not an IT support provider. **A partner.**

Imagine an office building. It has a janitor who comes in every evening and cleans up the mess that people make. That's how lots of IT support companies work. They just clean up the mess. We call this reactive support.

We actually prefer to work as a facilities manager. You see, a facilities manager is constantly thinking and planning. They schedule what maintenance the building needs. They look at what they can proactively do to stop the building falling into any level of disrepair. We call this proactive support.

Yes, there's still an element of managing the janitors and making sure they've done their job. But if we manage the facilities in a proactive manner, we can eliminate many of the problems from happening in the first place.

That's what an IT support partner does. We take a proactive approach. We do as much as we can in the background to stop things from going wrong in the first place.

Of course, things will still go wrong. Unfortunately, that's inevitable when it comes to fast moving technology and data. But that's when the clean-up work happens and things get fixed. All of that proactive work means that we need to clean up a lot less than an IT support company that doesn't work proactively.

What my team and I like to do for our clients is to create ongoing fluid technology roadmaps. It means that both you and I know:

- Exactly what will be happening over the next 2 to 3 years
- Exactly what technological investments you need to make
- And there are no surprises. It's all planned and regular strategic reviews help us all to move in the right direction

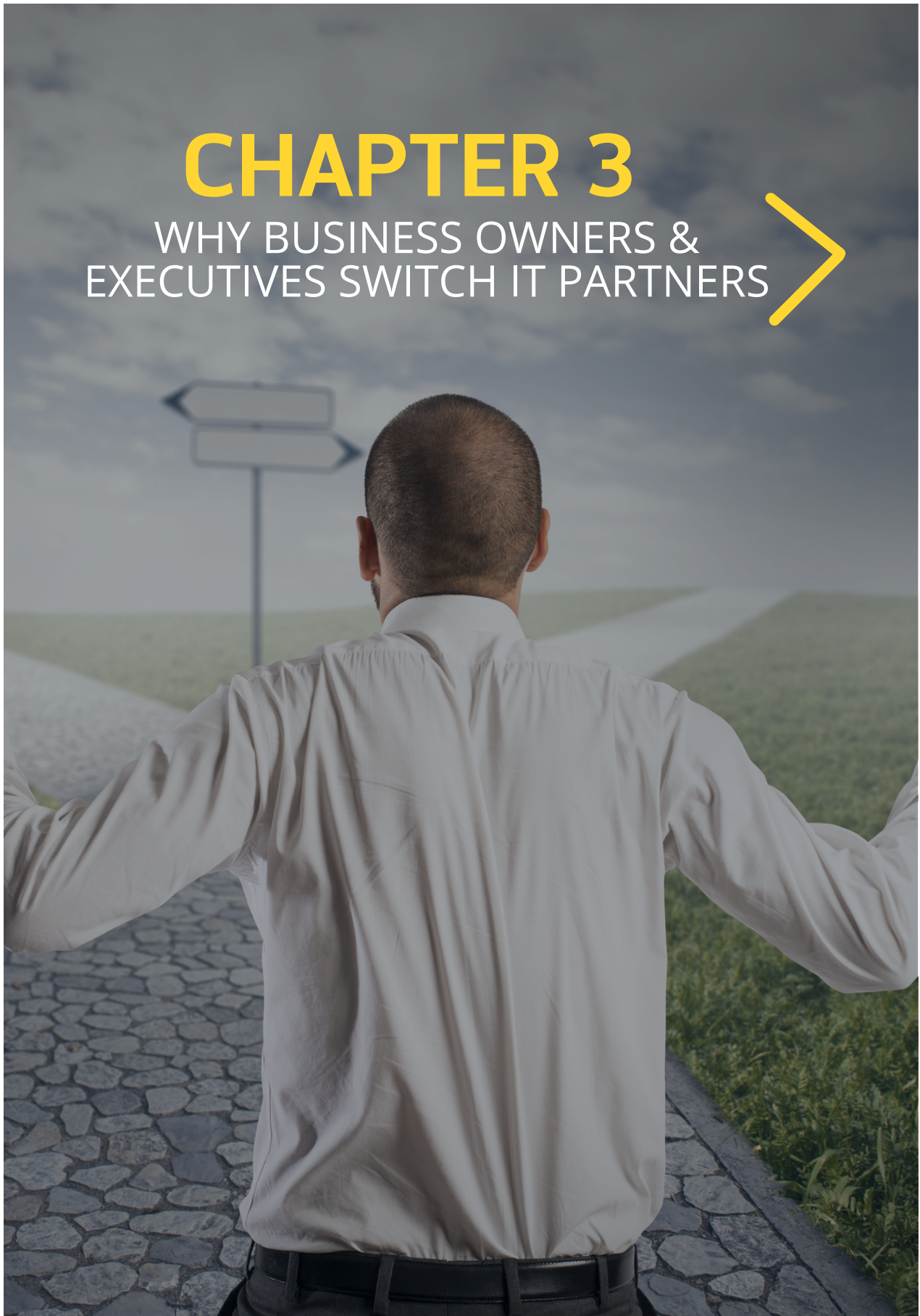
Our IT roadmap also allows us to see what can be delayed (if there's a problem), what investments are critical and - similarly - if you're ahead of things financially, what can be brought forward.

In large part, it's our partnership that allows this in-depth planning to take place. We get to know your business as if it's our own. We're constantly working with you on your business and learning more about you and your team.

This commitment makes it so easy for us to help you because we know (just as well as you do) where the business is going.

CHAPTER 3

WHY BUSINESS OWNERS &
EXECUTIVES SWITCH IT PARTNERS



You probably won't be surprised to learn that we heard from a lot of businesses last year who were unhappy with their current IT support provider.

And that's putting it politely!

Some of these businesses were extremely frustrated and upset.

They'd put a huge amount of trust in their supplier. They were made promises of better devices, more suitable software, a smoother working network. And it simply wasn't delivered.

Then, just when these businesses needed IT support the most, when the country was locked down in March last year... there was radio silence.

Their support vanished. Maybe because the IT support company wasn't large enough to transition all of their clients to remote working. Or because they weren't prepared enough to do it at the speed that was required.

These IT support providers worked reactively, extinguishing fires as they started. So this meant they didn't have anything in place for the strategy of "working anywhere, on any device".

Businesses were left on their own.

But it's not only the pandemic that's caused businesses to become frustrated with their IT support provider. We have been taking calls from people wanting to switch IT support since we started our business. As with many other things, the pandemic simply made this need to switch more urgent.

What are the **top 10 reasons** that people want to make the switch to a new and improved IT support partner?



REASON TO SWITCH 1) YOU'RE NOT SEEING BUSINESS RESULTS

Return on investment is everything. Especially right now. You need to be able to see at a glance exactly how hard your IT partner is working for you. And what benefit that work is bringing to your business.

An IT support partner should not only provide a detailed IT roadmap for the long and short term. They should also give you a set of metrics which you can measure results by.

And these metrics should be relevant and important to your business. Not a standard set issued by the IT support partner. Not convoluted with jargon. I've heard too many instances of IT companies providing very vague metrics that are impossible to decipher and useless.



REASON TO SWITCH 2) POOR COMMUNICATION

This can cover a whole range of issues... from it taking far too long for them to acknowledge problems... to them not letting you know when updates are taking place... or not getting back to you when they say they will...

If we were talking about any other kind of supplier, these gripes might seem a little petty. But as we know, without working technology, business can't run as it's supposed to. And these little gripes become huge issues.

Again, this is another way for you to distinguish an IT support provider from an IT support partner.

You need a responsive IT support partner who:

- Acknowledges issues promptly
- Keeps you in the loop of everything that you need to know, and
- Does what they say they'll do, when they say they'll do it

Just as your success is their success, your failure is their failure. So, the faster an issue can be resolved, the better it is for both parties.



REASON TO SWITCH 3) THEY DON'T TAKE CYBERSECURITY SERIOUSLY

Yes, you read that correctly.

There are some IT support providers – whose job it is to keep your data safe and secure – that don't do the same thing within their own business.

They don't make it a priority to keep themselves educated on the latest cyberattacks and threats. They can't keep you up to speed.

And they won't go out of their way to ensure every last part of your data is as safe as it can be. Or that your Windows patching and antivirus are 100% up-to-date all the time.

I know... this scares me too...

Is this really a company you'd want to be responsible for keeping your business safe from the growing number of data breaches?



REASON TO SWITCH 4) THEY WON'T GO OUTSIDE OF THEIR CONTRACT

"Sorry, we don't cover that. Check with your software vendor."

Ever heard that from your IT support provider? Lots of businesses have. But so long as the request relates to your technology, it should be a red flag.

"We don't cover that" suggests a real lack of concern for your business. And that's not what a partner is about.

A partner actively spends time looking at new ways to improve your network; your data security; and your infrastructure. They won't be working rigidly to a one-size fits all contract. We may not be able to resolve software issues, but we can coordinate with your software vendor to make sure the issue is resolved.

And that's just the point. One size doesn't fit all, because each and every business is unique. Even two businesses in the same street, selling the same product or service will have a different way of working. They'll use different software and devices, have different people working with them, and importantly, have different goals.

You need an IT support *partner* that will take your goals as their own and do as much as they can to help you reach them.



REASON TO SWITCH 5) THINGS TAKE TOO LONG TO FIX

Understandably, many problems can't always be fixed immediately. Some issues take a while to get to the bottom of. Other problems are rare and may take a little more diagnostic work.

But in these situations, good communication is key.

It might take you a while to see a resolution, but if your IT support partner is keeping you updated at each step, you're confident it's in hand.

However, if your support request is still awaiting a response three days later... you've got a problem.

And would you believe that some issues never get fixed at all? Or that one thing gets fixed only to break something else?

This is technology we're talking about. It goes wrong. It doesn't always work the way we want it to. But you absolutely should not be facing issue after issue and waiting days to have problems resolved. You should not face silence when you need help.

All that waiting means downtime for your business. Where's the value for money in that?



REASON TO SWITCH 6) THEY NEVER ACCEPT RESPONSIBILITY

When you take on an IT support partner, it's vital that both businesses take responsibility for their side of the agreement.

Failing to do so causes a huge lack of trust. And means that the relationship is going nowhere.

I've heard from business owners who have reported an issue to their IT support provider, only to be told that it's their fault that the issue arose!

(despite them following advice and instruction from that same IT support provider)

I've also heard from business owners who have reported issues to their IT support provider; only to be told that they need to contact someone else (such as a software supplier) about the problem.

The idea of an IT support partner is that you trust them to deal with their area of expertise, while you get on with yours. If they're passing the buck when you face a problem, you're not getting the benefit of a support partner at all.



REASON TO SWITCH 7) THEY CONFUSE YOU WITH TECH TALK

If technology wasn't complicated, everyone would be able to take care of their own business infrastructure without a problem.

However, the truth is quite the opposite. It's full of strange words and concepts, and everything changes every 7 minutes! (it seems that way anyway).

It's a minefield if you don't know what you're doing.

The hallmark of a good IT support partner is that they take this complication and make it look easy. Better still, they make it sound easy. They explain things to you without sounding like they're speaking a foreign language.

Again, it all comes down your connection as partners. If you can't communicate properly with each other, how fruitful is this relationship really going to be? The likelihood is that it'll leave both sides frustrated, and your business won't be able to make the most of the technology it has.



REASON TO SWITCH 8) YOU'RE NOT LEARNING

Ok, so we're not expecting your IT support partner to teach you their job. You don't need to be an expert in IT - that's what you're paying someone to do for you. However, there should be a certain element of learning when you partner with an IT company.

For example, you need to learn about cybersecurity; how to avoid scams; and how to protect your data.

If you're told "Let us worry about that," it should ring alarm bells. You can't expect to keep your organization safe from a data breach or data theft if you don't know what you're trying to protect yourself from.

It's also important that your IT support partner explains what they're doing. You really do want to have a basic understanding of how your infrastructure works or is set up for you. This will help you to help yourself when a minor issue occurs.



REASON TO SWITCH 9) THEY'RE ALWAYS PUSHING NEW HARDWARE

Many of our clients complain that their previous IT support providers spent more time pushing new equipment than they did on the fundamentals.

It's nice to have the very latest technology in your business, but it's certainly not vital. There are lots of other things to consider before upgrading equipment and devices. Especially today when value for money and return on investment are critical.

Of course, your business will need a certain level of equipment for you to operate the way you need to, but you probably already have most of the things you need. I find that for most businesses, it's far more important to get the infrastructure right before we even consider your hardware. Additional devices, for example, are sometimes nice to have rather than crucial.

A good IT support partner will help you to create a Technology Refresh Cycle, which should detail at which points in the years ahead you need to budget for upgrades or additional devices.



REASON TO SWITCH 10) YOU'VE OUTGROWN THEM

Now, this last one isn't necessarily a bad reason to switch IT support partners. Sometimes, your business simply grows too big for a smaller IT company to deal with.

That's actually great news for you. The difficult part can be knowing when to make the switch. Especially when you're working with a company that you like.

It's worth keeping in mind that if:

- Your support requests aren't being responded to as quickly as you need them to be
- Your IT support provider is only providing reactive support
- Or you need a higher level of support

... it's in your best interest to find a new IT support partner.

If you've noticed you need more support, your IT support partner has probably noticed too. In fact, if they're good partners, they may even discuss this with you first. Trust me when I say there will be no hard feelings. No company wants to be out of its depth with clients.

If you've ever had these complaints about your current IT support partner, perhaps now is the right time for you to make the switch too?

When you place your technology at the heart of your business growth strategy, you see why it's important to have a partner you can trust.

No business is perfect. Inevitably we get some things wrong for our clients some of the time, because we're human too.

But because we have partnerships with our clients, we're able to have adult conversations and change course quickly. We don't have to spend unnecessary time repairing relationships; rather we can set the correct expectations and resolve issues quickly.

CHAPTER 4

PROTECT THE MOST IMPORTANT
THING IN YOUR BUSINESS



As we've seen over the past few years, being able to work anywhere, any time, on any device is great.

We've been shifting to this way of working over the last 10 years, but in 2020 the transition to remote working was escalated.

This is the way many of us are working today, and that's how it's going to stay in the future, whether we're in a pandemic or not. Working flexibly like this means that businesses can reduce their costs; attract the best candidates for jobs; and have a happier workforce too.

But as our devices get smarter and more powerful, they're also becoming more disposable. As you'll know, you can do most things on your smartphone now. And how often do we lose or break them?

The thing is, because everything is stored safely in the cloud (that's the huge servers where you store your data, in multiple locations across the globe), if you lose your phone, it's no big deal. You simply get a new one and restore your files from your backup. Just like magic, you have a new handset that contains all the data your old one had.

A lost phone is now merely a minor inconvenience and a small financial cost. And it's not just phones this applies to. Your tablet and laptop work the same way.

This flexibility is amazing. However, it also has its risks. Number one being that any time you take your device away from the office, you're potentially opening up your data to anybody. The sad and scary truth is that there are countless gangs of cyber-criminals who are trying very, very hard to access your data. And even take it away from you.

You've probably heard about malware before. Malware, or malicious software, is code placed on a device or network with the aim of infecting, stealing, or corrupting your data. Essentially, a hacker can create malware to do exactly what they want, once it's within your network. It's a pain, because once it's there, it can take you a while to notice what's happened. And it can be tricky to remove.

But there's something scarier: Ransomware. This is actually the fastest growing cybercrime right now. And if you're not taking all the right precautions, it's likely that you will fall victim to this devastating form of cyber-attack at some point.

As the name suggests, ransomware is a kind of malicious software that encrypts your data so you can't access it. The hackers then literally hold your data hostage – you must pay ransom to recover access to your data.

For example, they might ask for \$75,000 - in Bitcoin, of course - within 3 days. If you fail to pay, this fee doubles. If a week goes by, you can kiss your data goodbye forever.

Ransomware is terrifying. Trust me when I say that you want to avoid this at all costs.

And while absolutely anyone can become a victim of ransomware, it's usually small and medium sized business that are targeted. Cyber-criminals know this is a group that typically doesn't spend excessive time or money on cybersecurity.

I don't want to bore (or scare) you with statistics, but it's worth you knowing it's estimated that 48% of businesses were attacked with ransomware in 2019. Average ransom paid was over \$170K. The threat continues to increase in quantity and impact.

The most common way for ransomware to get on your device or network is by someone clicking a link in a suspicious email. And before your jaw drops that someone - especially someone in your own business - would be naive enough to click a link in a scam email, you need to know these emails are now quite sophisticated.

Yes, these emails will look like dead ringers for genuine emails from someone you know or expect mail from - such as the IRS, your bank, even a department within your own company. And they not only look like the real deal, but the email address maybe a very close copy too.

These emails work because they ask you to do something relatively simple; click to update your details, for example. Even looking with a critical eye, it can be hard to spot that something is wrong.

Once that ransomware is installed, there's not always an immediate attack. In fact, it can take days or weeks for the ransomware to be deployed. Sometimes even longer. That's for a number of reasons.

Hackers will do things such as disabling your backups and antivirus, and even exfiltrate your data. And once they do deploy ransomware and encrypt your data, they may also threaten to release your sensitive or proprietary data as part of the ransom demand.

This is what makes ransomware so difficult to deal with. And it's why prevention is always better than cure.

You need to be aware of the signs of a hacker in your network . Both you and your IT support partner should look out for them:

- Unexpected new administrators appearing on your network
- Software being disabled
- New software being downloaded
- Remote access sessions lasting for days at a time

Of course, there are many signs to look for; but that will give you a good start.

A good IT support partner will always recommend everyone in your business has regular cybersecurity training. After all, your people are your first line of defense from cyber-attack. Software alone won't offer a good level of protection. You need software and humans.

Understand this, though: You can never be 100% protected from malware, ransomware, and other forms of attack. That's impossible, because it's a non-stop game where the criminals are always inventing something new, and the data security world has to catch up.

It is possible to be 99.99% protected; but you may be surprised to learn that we don't always agree with going that far.

You see, when you lock down **everything** to make your IT environment more secure, what you can inadvertently do is frustrate and annoy your staff. They'll have lots of extra layers of protection to go through, more steps in an already busy workload, and more to remember.

And what that means in the real world is that they'll skip steps and look for ways to bypass security. Which actually puts your business more at risk.

Think of it like a door to an office. If you have seven big locks and a biometric scan just to open it, eventually, people will get frustrated and just prop the door open!

To remove the frustration and hassle, we use a blended approach to cybersecurity. We pull together several products and services, which work together to protect you. It means fewer codes and passwords for your people, and a better level of security for your data.

And the greatest part is that every blend will be different, depending on the business it's for. That way we can customize cybersecurity perfectly for each client, based on their specific requirements.

CHAPTER 5

WHY YOU SHOULD BE HIGHLY
SKEPTICAL OF ALL IT SUPPORT
COMPANIES



You probably don't know, what you don't know about IT. Does that make sense?

I think that's a fair assumption for me to make.

And why should you concern yourself with the latest tech news, software, and support updates? You're too busy doing what you do best.

You probably already read your industry magazines, blogs, visit trade shows, go to conferences, and attend training... you're an expert in your field. That's what experts do. You certainly don't have the time to do all of that for your IT too.

Would you expect your clients to know as much about your area of expertise as you do? Of course not. That's why they hire you, isn't it?

The same goes for us.

We totally absorb ourselves in the highly technical, high speed, rapidly changing world of technology. We genuinely love it and pride ourselves on having a level of expertise that most people don't.

You'd be shocked how many people consider themselves IT experts, simply because they know their way around computers. However, in reality, great IT support companies operate on a completely different level – with better knowledge, tools, and systems.

The biggest problem when it comes to IT support is that it's an unregulated industry. There's no governing body that people have to pass through to be allowed to call themselves an IT support company. No industry standard that has to be met. No guidelines on how the business must operate.

Just about anybody... *literally anybody*... can hang up a shingle and say they're an IT support company.

This is why I say you should be highly skeptical of all IT support companies.

Without asking the right questions, you simply don't know if you're putting your trust - and the security of your business data - in the hands of a reputable, honest company... or someone working alone out of his house. The Independent IT guy, as I like to call those guys.

Now don't get me wrong, there's nothing wrong with Independent IT guys. Everyone has to start somewhere, and if you're a micro business (less than 10 employees) with minimal IT requirements, that could be the most cost effective solution for you.

However. If you own or manage an established, growing business, with staff and more than 10 employees, you'll need more than an Independent IT guy can provide. Remember what I was saying about IT support companies leaving their clients to fend for themselves when we were thrown into lockdown...

So how do you avoid choosing the wrong IT support company?

First, look for trustworthiness. You need to check they have the right qualifications, accreditation, and experience. Remember, it's an unregulated industry, so you really need to do the legwork if you want to end up with the best possible IT partner.

Next, you ask them some difficult questions.

You don't want to see your potential new IT partner squirm, but you do want to make sure that they are going to deliver what you need. And asking difficult questions is the only way to be sure that you're making the right choice.

ASK THEM: *"How quickly will problems be fixed?"*

Obviously, this one will depend on the scale of the problem, but you need to know Service Level Agreements based on severity. How long will it take your proposed IT support partner to acknowledge your issue in the first place? How long do they expect it'll take to get someone working on the problem?

Look at different scenarios. If you can't access your software, how long should it take to get you logged in. How long could it take to get your business up and running if you suffer a ransomware attack?

You also need to understand the approach your potential new partner will take. Do they have processes and procedures they stick to when issues arise, or are they winging it? Can they tell you about the worst problem they've encountered and how they dealt with it?

Remember, it's not the problem that you're judging them on, but rather how they responded to it. This can tell you a lot about their professionalism, knowledge, and ability to remain calm in a crisis.

ASK THEM: *“What do you do proactively, to make sure our IT systems stay up and running?”*

Downtime is a business killer.

You'll have seen it for yourself at some point, either in your own business or one you were working for. The Internet goes down, for example, and people can't access the software they need to do their jobs. The office descends into chaos. Even those who aren't reliant on the Internet stop doing what they're doing. The coffee machine goes into overdrive. Everyone forgets about their job for a while and makes the most of an unofficial break.

But then when things are up and running again, people don't immediately get back to business. Conversations are finished, systems are rebooted, everyone needs to regain their focus. And that often takes even more time. So, what should have been a 15 minute interruption loses you 90 minutes of work. And that's if it's a minor problem. What can your proposed IT support partner do to minimize this downtime?

Will they be working away in the background, making the necessary checks to ensure that the majority of these little blips don't arise? Can they assure you that most updates and maintenance will be carried out outside of working hours?

Do they have any other solutions that will mean your business maintains productivity while essential work is taking place?

ASK THEM: *“Tell me about the specific people who'll be managing our account”*

Though it's a really important question, many businesses overlook this side of things when it comes to working with a partner.

It's really good to know about the actual people you'll be working with. The people behind the business.

How does your proposed IT support partner assign your Fractional CIO, for example? Do Fractional CIOs have specific industry expertise? Do they match you on how your personalities may work together? Or do you simply get assigned to the person with the smallest workload?

Will you always be speaking to the same person? What happens if that person is on vacation or ill? Who will be doing your Quarterly Strategy Reviews and building your IT roadmap? Who do you talk to if you're not happy?

This question is a great way for you to get to know more about the company you're hoping to work with. But it's also a great way for you to figure out if their people are the right match for yours.

ASK THEM: *“Can you explain something highly technical to me?”*

With this question, I'm not suggesting that you actually try to learn the ins and outs of building an IT infrastructure from the ground up. Rather, it demonstrates your potential IT support partner's ability to explain things to you in English; not tech-speak.

Can they explain a really complicated, technical process to you in a way that you can understand? Do they get frustrated if you ask too many questions? Do they brush you off with 'you don't need to know the technicalities of that'?

It's vital, if you are partnering with someone, that you can communicate with each other clearly, without any confusion or breakdown.

It also demonstrates their ability to educate you.

ASK THEM: *“How will you keep on top of the constant changes in my business?”*

It's no secret that successful businesses deal with a lot of change. From adding new staff members, to tweaking the product or service you offer, it's likely that your business is forever changing things. It's the way we grow.

In fact, your business probably looks very different now to how it looked 12 months ago (even without the pandemic-related changes).

So how would your proposed IT support partner cope with that? How much do they need to know about these changes? Will it affect what they're doing for you?

It should. Let's remind ourselves that you're looking for a partner here, not just another supplier. It's part of their role to be able to make recommendations based on how you're working. To suggest better software to use, a smoother network, more appropriate security.

If they can't keep track of how many people are working for you, or the ways you deliver your service, how can they suggest ways to grow, improve – and especially, stay secure?

Look for a new partner that takes an active interest in the changes happening within your business. Perhaps even arrange regular catch-up sessions to ensure they're on top of everything that's going on.

There are lots of other questions that you should be asking, but I feel these are the 5 that will tell you the most about your potential partner.

CHAPTER 6

WHAT EVERY IT SUPPORT COMPANY
WISHES YOU KNEW ABOUT IT



Before you skip past this chapter, I'll add my disclaimer here:

I am not about to bore you with technical jargon or TLAs (three letter acronyms).
Please do not panic!

What I am going to talk about are the basic things that - if every client knew them - would make our lives a lot easier.



#1: YOUR SETUP NEEDS CONSTANT MONITORING AND MAINTENANCE. IT IS NOT A ONE-OFF JOB.

Computers, Servers, IOT, and other devices need to be updated frequently. And that's because things are constantly changing.

The same applies to your network and infrastructure. Firmware is always changing; operating systems are being tweaked; and hardware deteriorates. It literally never ends.

It's rare that an IT setup isn't constantly monitored and maintained. If you're not offered 24/7 monitoring and maintenance as part of your IT contract, run away! You will start seeing issues before the ink on the contract is dry.

Most IT support companies do it all in the background and you simply never hear about it. In fact, a great IT support partner will spend a great deal of its time monitoring what's going on within your system, and proactively fixing issues before you even realize you have a problem.

You'll simply never notice its going on. And really, that's exactly what you want; monitoring and maintenance you don't even notice.



#2: THE SUPPORT TRIANGLE IS LIKE THE HARDWARE TRIANGLE

This is a fun concept to learn about buying hardware.

Picture a triangle in your mind. The three equal sides of the triangle represent quality, price, and speed.

If you make one side longer, then all the sides will lengthen to keep the triangle together. For example, if you pick a faster computer, typically the quality and price will also increase.

IT support has an identical triangle with the same three sides: Quality, price, and speed.

If you buy cheap IT support, it'll be slow and lower quality. And vice versa.

Ideally, you'll look at what you can realistically afford to spend on IT support and go with the top of your budget. That's because you understand IT support is actually an investment into your business. Get your IT setup and your business IT strategy right; and it makes hitting business goals so much easier.



#3: BEWARE THE INDEPENDENT IT GUY

Let's go back to him for a moment.

Picture a guy, working from home, carrying out your IT support service. He hasn't got the overhead we have, so of course his service will be a lot cheaper.

But remember the triangle – his response speed will be slow and he won't have access to the professional IT tools, because they're expensive.

If you choose an Independent IT guy, doing everything himself, to provide your IT support – that's fine. Provided you're his only client. Realistically, one person should be able to carry out the IT support, maintenance, and monitoring that a business like yours requires.

But what happens when he gets another client?

And another? And then realizes, because he's cheap, he needs even more clients just to make a decent living?

The quality of the service you receive falls. As does the speed in which he reacts to your problems. It's likely that he'll also stop doing the proactive work for you, because one person simply cannot service a large number of clients properly.

Yes, you pay more for an IT support partner with an office, team and all the tools. But you also know that they're set up to keep service levels high, no matter how many clients they take on.



#4: WE ASK FOR A LONG-TERM PARTNERSHIP TO PROTECT YOU MORE THAN US

We don't want to work with people short-term.

We refuse to do ad-hoc work, and one-off crisis management.

We only want to work with businesses as part of a long-term partnership. Why?

Well, obviously, it's good for us to build our own business around long-term clients. It's a great business model, if we're honest.

But the real benefit of long-term partnerships for us comes from the investment we're able to make in our clients. So that we know you inside out. It means we can:

- Work more closely with you
- Learn about your priorities and take an active part in getting you towards your goals
- Customize your infrastructure and IT strategy around where you're heading, rather than where you currently are
- Build an infrastructure that grows with your business
- Keep you better protected, because we can take an honest and strategic approach when we work as part of a trusting partnership.

When you work with someone on a short-term basis, it's impossible to do this.

A long-term partnership means we'll be as invested as you will be. Because we genuinely care about your business. If you're doing well, we are too.



#5: OUTSOURCED IS BETTER VALUE FOR MONEY. AND IT HELPS YOU ACCESS BETTER EXPERTISE THAN IN-HOUSE IT.

As you're reviewing your IT support, it's probably crossed your mind that you could hire an in-house employee.

There's a big downside to be aware of. Did you know that the average IT person stays in the same job for only about 18 months? And when you have an in-house person, you're asking them to wear many IT hats - end user support, server support, cloud management, IT planning & budgeting, and cybersecurity, just to name a few.

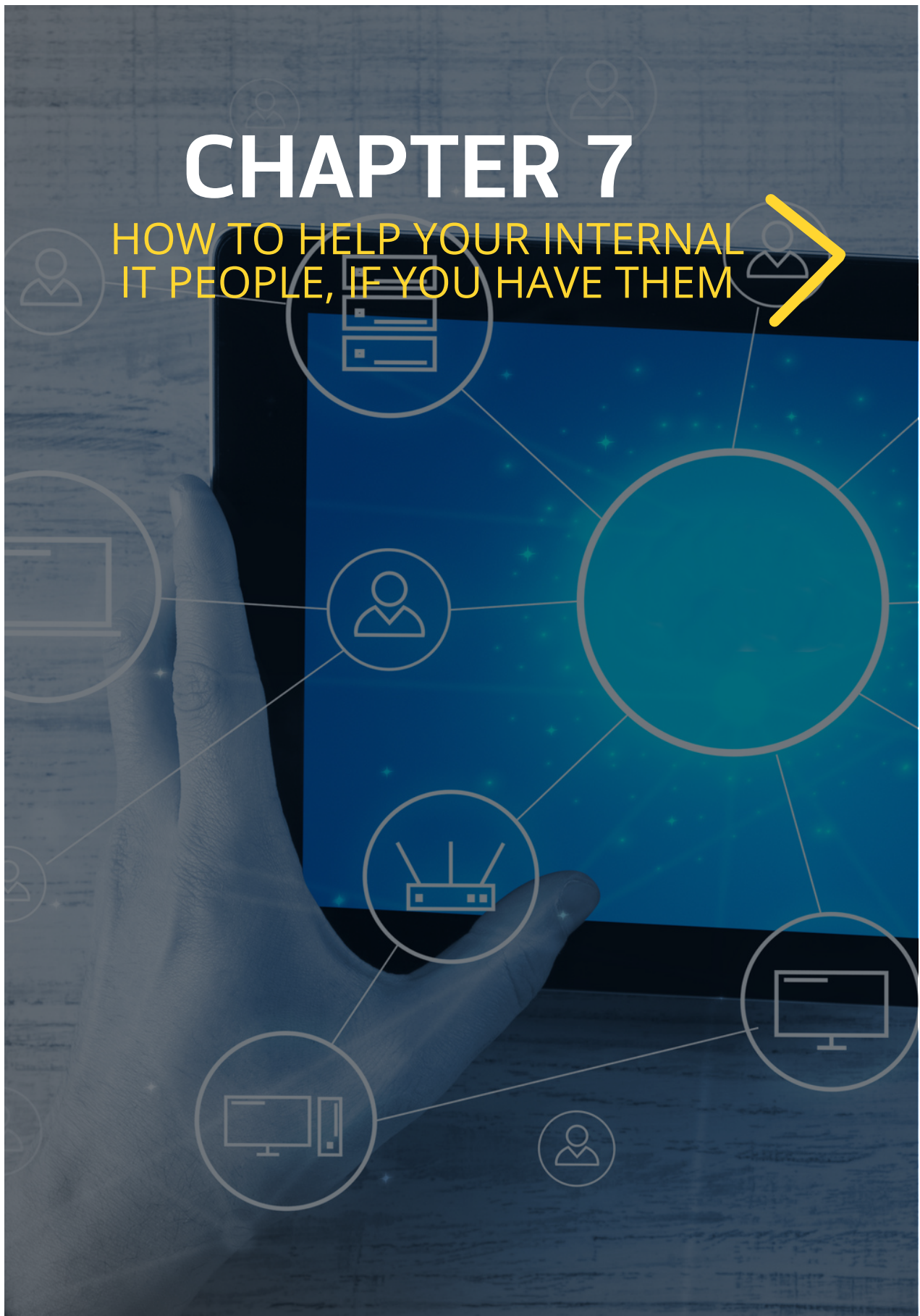
Someone that can do that without having some kind of breakdown would be hard to find! Certainly, they'd soon learn to cut corners, just to get home on time each day. And they definitely wouldn't have time to become a cybersecurity expert!

There are many advantages of IT outsourcing:

- Get IT Strategy, Budgeting, & Planning; not just reactive IT support.
- Scale your IT support needs up or down as needed.
- Get access to Fractional IT resources who are experts at what you need.
- Reduce your IT staff recruiting, hiring, training, and retaining expenses in a hot job market.

CHAPTER 7

HOW TO HELP YOUR INTERNAL
IT PEOPLE, IF YOU HAVE THEM



Sometimes, the businesses we work with have internal IT people. And a senior member of staff who takes on responsibility for the IT, without actually having a background in IT themselves.

If that's you, then you should be scared. Terrified in fact.

Not because you don't have the skillset. But because if your IT goes badly wrong – I'm talking ransomware attacks or similar, large scale problems – the responsibility rests with you.

Luckily, there is a solution to protect both you and the business. It's called co-managed or hybrid IT support.

You retain your in-house IT people. And we help them with whatever support they need, at whatever level.

The best way to describe our help is to imagine a donut, with your internal IT person in the middle. Yes, it's a big donut!

They benefit from support all around:

- At the bottom: Help handling the low level stuff that's important but can be overwhelming. Such as being the help desk for your staff; monitoring the network; rolling out updates
- At the sides: Support at their skill level, to help them cope with workload, and have direct access to an experienced IT team to bounce ideas off
- From above: High level strategic advice and long-term planning

Our job is to compliment your internal IT people. But add in the partnership and strategic overview. So there's plenty of high level thinking and support on tap.

This gets the most out of your internal resource. And also, fully protects you, as the person with ultimate responsibility.

Some IT managers see outsourced IT support partners as a threat.

We are not a threat.

Our job is to make you and your internal IT people look great and operate brilliantly.
When you look great, so do we - we all win!

CHAPTER 8

About Us



THE **FULCRUM** GROUP

One Technology Solution: Yours



SPOT

Managed IT Services

I love our team! We have a group of motivated, intelligent, hard-working, fun-loving people. We call ourselves Fulcrum Family (or Fulcrumites - or, when we're really feeling wild, Fulcrumaniacs).

Let me now properly introduce myself and my business.

Humble Beginnings

Fulcrum Group was started by Steve Meek and David Johnson as a “virtual” company, with no offices, and just a single small server hosting files and applications at David’s house. Fulcrum Group did break/fix IT support and IT projects such as deploying servers and network infrastructure. By mid 2003, Fulcrum Group had moved into its first office space in Keller. A few years later, Fulcrum moved into larger office space in the same business park in Keller, where it would remain until 2014.

Transition to Managed IT Services Business Model

Fulcrum Group continued to grow and by 2007, it was obvious that the break/fix IT support business model was broken (we made more money when clients had more problems), and that the Managed IT Services business model (both Fulcrum and the client benefit when IT runs smoothly) in Dallas Fort Worth was the future. By end of 2007, Fulcrum had made the jump into Managed IT Services with its SPOT Managed IT Services program.

Fulcrum Group moves to the Alliance Fort Worth Area

By early 2014, Fulcrum Group President Steve Meek recognized that the office space configuration at that time was not conducive to teamwork and efficient service delivery. In late 2014, Fulcrum Group moved into the Alliance Fort Worth area with a streamlined office layout that made team communication and collaboration the priority.

Fulcrum Group introduces STAR Power

From 2007 to 2018, Fulcrum Group introduced many incremental improvements to its SPOT Managed IT Services program, adding many clients in Dallas Fort Worth area during that time. During Fulcrum Group’s Annual Planning for 2018, it was decided that Fulcrum Group would take the evolutionary step of moving from a Managed IT Services Provider (MSP) and become a Technology Success Partner (TSP). To become a TSP, Fulcrum Group revamped its service delivery to focus on IT process and alignment of technology standards to our clients’ business goals through our STAR Power (Proactive Services and Fractional CIO working together).

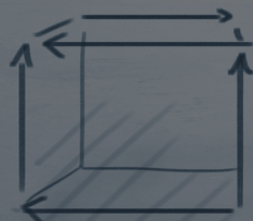
Awards

Fulcrum Group has been recognized by its peers and business leaders for a variety of awards over the years, including:

- CRN Next-Gen 250 List 3 times (2012 – 2014)
- Digium Pinnacle Partner Award Winner 8 times (2012 – 2020)
- Fort Worth Chamber Small Business of the Year for 2017
- Channel Futures MSP 501 List for 2018 - 2021
- CRN MSP500 List for 2020-2021

CHAPTER 9

WHAT WILL TYPICALLY HAPPEN
DURING YOUR FIRST 90 DAYS



If you're ready to explore working with us, here's some important information you need to know.

When we begin to work together, the first 90 days are the most critical.

My team and I will be working on three key areas:

- 01 Learning as much as we can about your business
- 02 Fixing any outstanding problems left behind by your old IT company
- 03 Creating your technology strategy

I hope and expect to work with you for years to come, in our partnership. My goal in these first 90 days is to set you up for success.

You'll know what we can and can't do, with realistic expectations. What we need from you. And how to be a great partner.

We'll survey absolutely everything and examine every tiny part of your current IT setup. The more we know the better. All of the answers are fully documented in our secure systems.

We'll even ask about your 3rd party IT vendors, such as Accounting/ERP applications, cloud applications, and VOIP/Telephony systems.

Even if we're not directly supporting these things, we still want to know how it works and who's supporting it. At some stage in our relationship, you're going to ask us about it. We need to know about every single service or third party vendor you're currently using.

Of course, it will mean there's a bit of work for you and your team. But I promise it will be worthwhile. And you'll only need to do it once.

Once my team has all the information, they'll strategically analyze it. To make sure they understand every aspect of your technology. Any IT support company that doesn't do this is simply not doing their job properly.

Then we're going to talk to your team. Key stakeholders, department managers, executive team.

We'll find out what their existing IT problems are; what frustrates them; and what makes their job more difficult. We'll also review anything your previous IT support provider told them couldn't be done, fixed, or created. There's no promise we can make it happen. But of course, we'll try.

Your first 90 days are going to reset everything. And then get your entire IT setup back up to the high level it needs to be (and where it will stay).

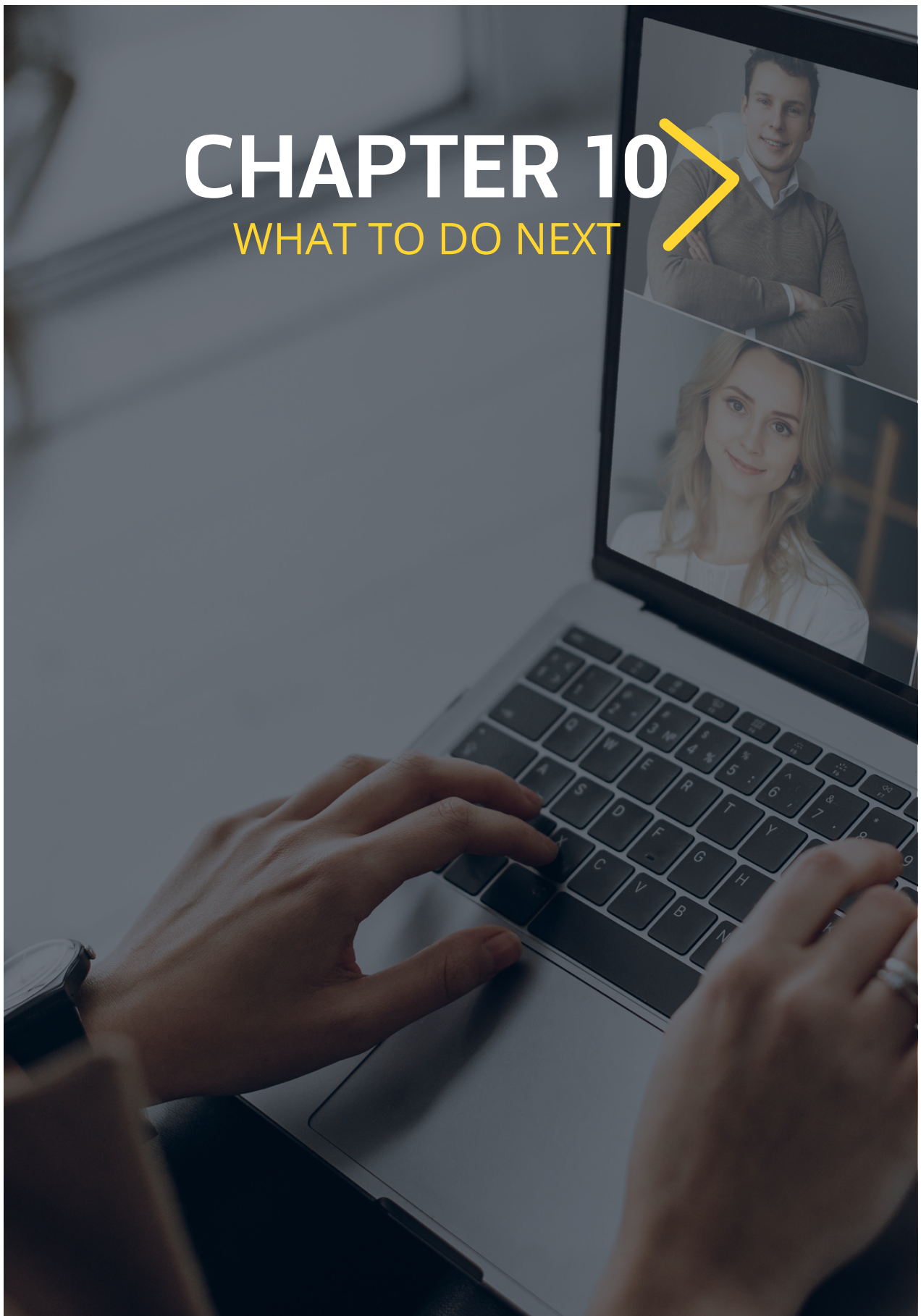
Then – and only then – you and I begin our strategic, forward-thinking work together.

This is a unique process for every client. I can tell you more about it when we talk.

Here's what to do next...

CHAPTER 10

WHAT TO DO NEXT



I hope you've found this guide useful, and that it's covered many of the questions you've had about choosing a new IT support partner.

Perhaps it's made you look at your IT support in a different way?

Good news – we're currently taking on new clients. That's why I wrote this guide.

I'd really love to talk to you about getting better results from your IT.

If you're serious about working with a new IT support partner to improve your business and contribute to long-term growth, this is your next step:

Book a 30 minute, no obligation video call with me at <https://outlook.office365.com/owa/calendar/TheFulcrumGroupSPOTManagedITServices@FulcrumGroupdotnet.onmicrosoft.com/bookings/>

You'll see my live calendar on that page.

You and I can check that our businesses are a good fit, and arrange a longer video call, or physical meeting (whichever is most appropriate at the time).

Of course, there's no obligation to buy anything, ever.

I'm looking forward to speaking with you and learning about your business.



David Johnson,
Vice President
The Fulcrum Group



www.fulcrum.pro



www.linkedin.com/company/795291



www.facebook.com/TheFulcrumGroup

This is how you can get in touch with us:

CALL: 817.337.0300 | **EMAIL** sales@fulcrumgroup.net

