
GLOSSARY OF FULCRUM GROUP TERMINOLOGY

4 Types of IT Work

From the book *The Phoenix Project*, refers to Business projects (Projects around delivering direct customer value), Internal IT projects (Infrastructure and operations projects, internal improvements), Changes (Fixed, changes, improvements generated by the two above) and Unplanned Work (Incidents, fixing problems in the three previous types of work).

Fulcrums

We divided our service delivery team into specialized job roles to support our accountability culture and promote enhanced results over generalized team members. The 5 roles are Service Desk, Platform Services, Professional Services, Proactive Services and Fractional CIO. The key point is if business waste time and money responding to just Unplanned work, they never invest in the the other three areas which deliver more value).

Alert

This ticket type is used by the Datto RMM or Auvik remote monitoring alerts. According to AutoTask, alerts are assigned this category initially until we are able to code it as either an incident or problem.

Break/Fix

Reactive, by-the-hour support for non-SPOT clients

Call for Materials Document

A Fulcrum checklist of items requested for new SPOT Managed IT clients during onboarding to quickly determine what information a client has on their business and their technology to help us maintain systems.

Change

Allows you to describe a significant change that might resolve one or more problems or incidents. It allows you to track related problems and incidents, and will manage and track the approvals by other members of your organization. I would think once root cause is discovered, a change would be proposed to correct the issue. Example: Replacing a server to resolve multiple performance issues with multiple customers.

Checklist

Functionality in our ticketing system that allows us to document specific steps to be checked off on a ticket or for a specific event.



Endpoint

A term for a device, generally referring to a Windows or Mac PC, notebook, or server.

Fractional CIO

This Fulcrum consultant is your business and strategy expert and meets with you quarterly to continually update your technology plan, help with budgeting and sharing tools and provide advice on what other organization do for various results.

Fulcrumaniacs

Fulcrum employees who are passionate about Fulcrum's mission, vision, core values and STAR Power

Fulcrumation

The process of using Fulcrum technology tools such as SPOT Network Monitoring to automate IT tasks

Huddles

Every Fulcrum team member participates in at least a weekly alignment huddle to make sure everyone is focused on the right things. Service team members have a daily morning huddle with everyone communicating what they are working on, their daily KPI result and if they are stuck on anything they might need help on.

Incident

This is our default ticket type. An incident describes an unplanned interruption to an IT service or a reduction in the quality of an IT service. This will be the majority of our tickets. Example: Failure of one disk from a mirror set.

IT Glue Documentation Portal

Online documentation portal that we use to capture and document Sysdocs, SOPs, and other documentation important to managing a client's IT environment.

Maintenance Window

A mutually agreed upon recurring time each month when we can set up patching or other network management activities to run on your systems. Then users know to leave their systems on to get the newest Windows and applet updates (like Adobe Acrobat, Flash, Java or others)

MSP - Managed Service Provider

Industry term; Fulcrum prefers to be known as a Technology Success Partner

On-boarding

The process of bringing a new client on for SPOT Managed Services program, provisioning our systems, learning about the clients business and documenting the network, contacts and vendors.





Typically includes 3 phases - 1) Gathering system documentation/knowledge transfer from previous IT provider; 2) deploying our SPOT Management platform, and 3) Performing an IT Gap Assessment.

Platform Services

This Fulcrum engineer role drives automation and deployment strategies of our centrally managed tools to ensure proper setup, complete deployment and automation. Examples include monitoring, patching, ticketing system, remote control, documentation and our various cloud services. They look for improvements that can affect our entire client base.

Proactive Services

This Fulcrum engineer comes onsite and conducts your S.T.A.R. review multiple times per year. As your primary technology advocate they learn your systems, help document them in our platform tools and drive access to our other teams.

Problem

Tracks the cause of one or more incidents. The cause is not usually known at the time a problem ticket is created, and further investigation is required. We should be able to attach one or more incidents for the same issue to a main problem ticket to discover root cause. Example: A power outage results in disruption of service to several customers.

Professional Services

These are the Fulcrum engineers with more specialized skills that would be deploying new technologies such as network infrastructure, virtualization, storage, voice over IP or specialized security tools. They are also called upon for more consultative engagements such as audits and assessments and act as a SWAT team.

Project Cover Sheet

A summary document breaking a more detailed Scope document and Work Breakdown Schedule (WBS) into a 1 pg summary to communicate project phases, hours and resources.

Rockefeller Habits (also known as Scaling Up)

The Fulcrum management team has used the Rockefeller Habits/Scaling Up framework for years for its business planning purposes. The toolset promotes annual planning, daily huddles, core values, meeting rhythms and other things to ensure a smooth running operation.

Saul Goodman Checklist

Fulcrum engineers identify critical systems in your business and applications that run on them. We also create automated routines to check that services are running after patching reboots and other times to help your business stay running. The checklist is supposed to make sure "it's all good man", on your network.



Service Call

Tickets with issues that cannot be handled remotely may require onsite visits for hands on access. These visits are considered service calls.

Service Desk

This technical team takes phone calls, emails and review alerts for those times where support is reactive in nature such as password resets, email issues or new software installs.

Service Level Agreement

Defines the level of service by Fulcrum to it's clients; usually measured in response time, resolution time, and customer satisfaction survey average

Service Request

Service Requests are typically stand-alone requests from a user for information, advice, a standard change, or for access to an IT service. Service requests are usually handled by the Help Desk and do not require a Change Request to be submitted. Example: Reset a password, or provide standard IT services for a new user.

SPOT Connect

Our remote control tool, powered by ScreenConnect.

SPOT Managed IT User

A named IT user for a Fulcrum SPOT client. This differs slightly from an Endpoint which is a Windows PC or Server.

SPOT Network Monitoring

A comprehensive set of tools for network support. They include tools to help 1) manage Windows machines (alerts, patches and performance trends), 2) manage network devices (firewall, switches, wireless), 3) update Windows users to our ticketing system and 4) to help facilitate always on remote control.

SPOT Protect Backup & Disaster Recovery

Our combination of hardware, software, local storage, and cloud storage that creates a complete backup & disaster recovery solution.

SPOT Shield End User Security Security Awareness Training

Basic free end user security awareness training through the Breach Secure Now PII Portal. Included by default in our SPOT Managed IT Services agreement.



SPOT Shield Managed IT Security Services Breach Protection Portal

Access to SPOT Shield Breach Protection Portal for admin and end users, this is an add-on to a SPOT Managed IT Services agreement.

- Annual Employee Security Training and Testing through Breach Protection Portal
- admin reporting on IT Policy end user acknowledgement, Security Training end user completion, and Simulated Phishing Attack clickthroughs
- admin reporting on Employee Vulnerability Assessment (EVA), a scoring system to rate user Security risks
- Security Micro Training (short, quick Training) through weekly emails
- Security Awareness Newsletters through monthly emails
- Simulated Phishing Attacks through Breach Protection Portal
- Annual Security Risk Assessment questionnaire through Breach Protection Portal
- Access to unlimited Dark Web Assessments through Breach Protection Portal
- Dark Web Monitoring & Notifications
- Access to sample IT Security Policy templates
- Access to Security Documentation through Breach Protection Portal
- Security Incident Tracking
- Service Provider Tracking

STAR Power

Fulcrum Group has crafted a more strategy-oriented technology relationship based on this knowledge. Our Standards and Technology Alignment Review process blends 2 dedicated client advocates within our firm to develop your annual technology plan. Proactive Services + Fractional CIO delivering our results based on technology standards aligned to business goals.

STAR Reporting System

Fulcrum online portal used by Proactive Services and Fractional CIOs to collaborate on Fulcrum's 200+ standards and best practices. It allows us to systematically deliver our Business Alignment Report to help you plan and improve your technology strategy.

STAR Visit

Our regular STAR Power onsite visit with each SPOT client, at least quarterly, but may be more, based on number of endpoints managed. The same resource comes most of the time to ensure we continue to learn your technology better, past onboarding.

Sysdocs

Our routine process of gathering passwords, Windows domain information, licensing and other pertinent





information to support client networks. We have created an online system to organize and track client information for our support team to know your network characteristics.

Technology Budget

Annual budget put together by Fractional CIO with the assistance of the client, Professional Services, and Proactive Services

Technology Road Map

Visual representation of a SPOT client's technology roadmap

Testing

Before a technical change is made, engineers conceptualize how to verify that the change will be successful. After implementing one or more changes, engineer testing is done to verify no new issues are created. Usually this is reviewing logs and/or actual testing with an admin or actual user credentials. When our testing is completed, we would then verify with one or more users from their machines and users to more thoroughly verify success.

Ticket

Incoming service request from any Fulcrum client capturing all data and activity relating to a support incident. Can be via phone, email or automated alert and used to ensure we complete tasks we know need attention.

TNT- Today Not Tomorrow

Philosophy aimed to drive our service team to complete incoming work in a timely fashion for our client. It refers to us closing tickets in the same business day they are created, to avoid backlog. Fulcrum's goal is 90% or higher every day.

TSP – Technology Success Partner

Fulcrum's preferred definition of itself. We deliver predictable results by aligning technology with the client's business goals so clients have more efficient and effective technology.

