

FROM CHAOS^{TO} CONTROL

Your Guide to Business Efficiency & Productivity

Inefficiencies are costly. In fact, companies across the globe lose millions every year to inefficient practices.

Just searching for poorly titled or misplaced documents costs organizations an average of \$3,900* per employee, per year. And that's just one small activity within a business. If something so small can add up to so much, imagine how much larger-scale inefficiencies must cost.

[Is your business as efficient as it can be?](#)

As we all know, time is money. And if your employees aren't spending their time carefully, you could be losing out on low-hanging profits.

As a company grows, it's natural for everyone to want to follow their own processes for accomplishing tasks. But that's not really scalable or efficient.

What if your company could become 20% more efficient just by making a few simple adjustments? What would that mean for your business? What if it was 30%?

In this guide, we'll share easy ways to identify and correct inefficiencies in your business, so your company can live up to its full profit potential.

This guide is designed for you. Jump to the section that most applies to where you're at in the efficiency-gauging process, or read all the way through from cover to cover. The choice is yours.

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*Brassfield, Marissa, "Searching for Documents Costs Companies \$3,900 Per Employee Each Year in Productivity Losses [infographic]," Payscale, June 7, 2012.

Part 1: Pinpointing Inefficiencies in Your Operations



4 Major Contributors to Inefficiency

Managing a business of any size is hard work. When you're just starting out with a handful of employees, it seems very manageable. But as you grow, things can quickly get hectic.

Why is that?

Is it just the price we pay for growth? It doesn't have to be. Many studies suggest the inefficiencies that surround growth can be minimized by careful planning. Let's explore the top 4 contributors to inefficiency (and what you can do to avoid them).



1. Poor Visibility & Accountability

The more employees you add to your company, the less visibility you have into day-to-day operations. The hands-on approach goes by the wayside. And if you're not careful, things can quickly spiral out of control as each employee decides to do whatever he/she feels is best.

One employee might IM a client to resolve an issue, another might email, and yet another might phone. But if that's not documented anywhere, how can you deliver a seamless client experience the next time the customer calls, or even ensure that the time worked is billed to the client?

That lack of accountability can end up costing you thousands upon thousands of dollars each year. Proving this point, IDC discovered that enterprises that employ 1,000 knowledge workers waste \$5 million every year due to duplicate efforts. While your number of knowledge workers might be closer to 5-10, that's still \$25,000-\$50,000 per year that could be leaking out of your company.



Signs your company is suffering from poor visibility or accountability:

1.

You don't know what's going on

2.

There are no checks & balances in place to ensure employees perform key activities

3.

Techs cherry-pick the tickets they feel like working on rather than starting with the highest priorities

4.

Each employee has his/her own processes—no standardization

5.

Customers complain their requests get lost

So how do you lead your growing business without running yourself ragged? **With visibility that drives accountability. When you have at-a-glance visibility into each employee's progress on their priorities, you can course-correct as needed, before anything gets out of hand.**

*"Do You Duplicate Work?" Synata, Nov. 11, 2014.

2. Poor Communication

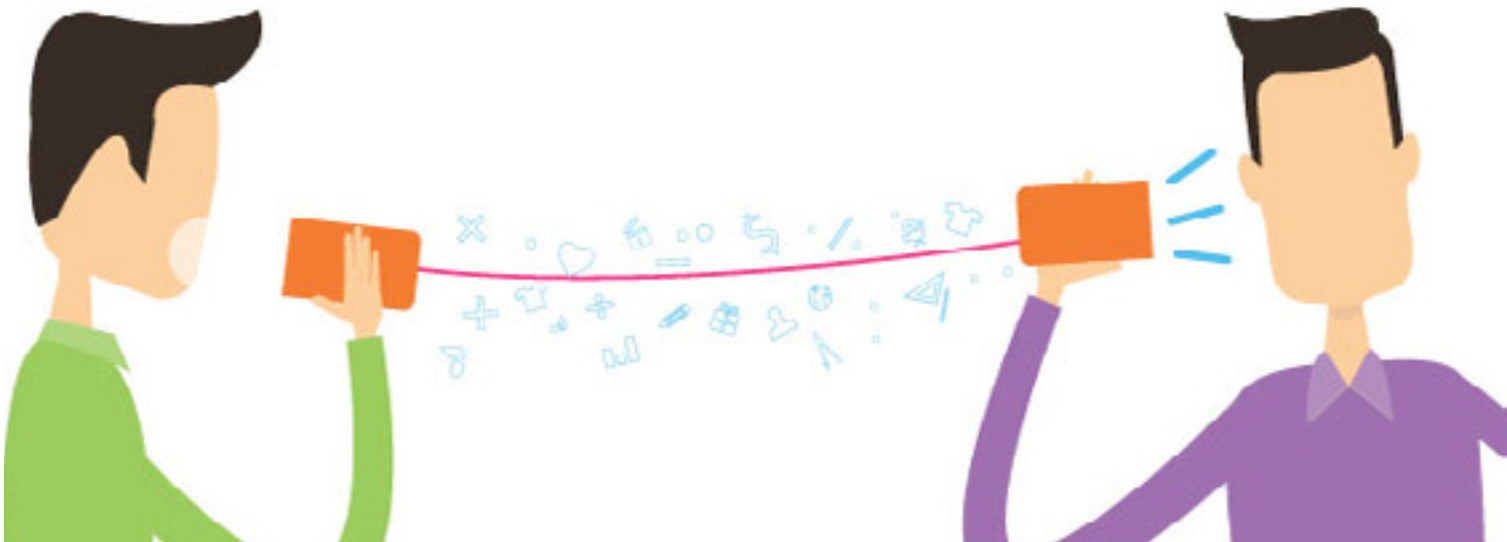
It's embarrassing when a customer talks to Paul about an issue, then calls back with an update and gets Grace, who has no way of accessing the initial request because it's on Paul's 'to-do list' (his brain).

Simple customer service requests can turn into a sticky web of frustration when there's no central location in which to store and access the data needed to make daily operations run smoothly.

So often, it's just easier to let every employee work the way that works best for him or her. They each have their own file on your company's shared drive, and that's that. Harmless. Or is it?

According to a McKinsey report*, employees spend 1.8 hours every day—9.3 hours per week, on average—searching and gathering information. Put another way, businesses hire 5 employees but only 4 show up to work; the fifth is off searching for answers, but not contributing any value.

Regardless of whether you're a small shop or a growing empire, that's a painful number. Not being able to find what you need, when you need it can add up to astronomical productivity losses.



Signs your company is suffering from poor communication:

1.

Tedious hand-offs from sales to implementation

2.

Duplicated efforts

3.

Issues falling through the cracks

4.

Customer-related contract or agreement disputes

That's no way to run a business. It stresses you out, along with your clients and employees. You spiral into Silos of Chaos™, where collaboration is hard to come by.

Instead, provide a central source of truth, where each client's detailed service history is easy for any employee to find.

*"Top 3 Reasons Why We Spend So Much Time Searching for Information" UTR, May 14, 2013.

3. Leaking Billable Time

Ever feel like you're coming up short at the end of the month? Your employees need a painless way to track their billable hours. It should be so easy that they have no problem posting time as it's worked.

Your techs should aim to achieve 80% utilization. That's the average utilization percentage of best-in-class technology solution providers. Gaining visibility into how your employees spend their time is the first step to fixing this problem. Without that visibility, you'll just be guessing at what could increase the utilization rate.

Often, administrative tasks are to blame. If your best-compensated techs are spending half of their time manually entering data into a system (or looking for data someone else entered), that's going to dramatically reduce their billable utilization rate.

Signs your company is leaking billable time:

1.

Utilization is low

2.

Billable time isn't documented in real time

3.

Employees 'estimate' time worked instead of starting/stopping a timer



A business management solution can help them capture the billable time they're already working, but forgetting to document. Such a system can also give you visibility into all the manual tasks that are eating up your employees' billable time.

4. Slow Service

In the digital age of constant communication and instant gratification, no one wants to be known as the slow service provider. Your customers need constant uptime. Their success relies on your ability to keep their systems up and running.

When customers start to complain about the time it takes you to solve their problems, you can bet your pricing will be called into question next. No one wants to pay good money for poor service.

When nothing is documented, information isn't centralized in a system that's easy to use. There aren't standard, repeatable processes for your internal team to follow, and no one can promise that service level agreements (SLAs) can be adhered to.

It's a chaotic, reactive environment where the customer screaming the loudest receives service first.

Signs your company is providing services too slowly:

1.

Customers consistently complain about the same issues

2.

New clients have to wait months for service

3.

Customers threaten to break their contracts if they don't receive service ASAP

4.

Customers have to call to remind you they still need help with their issue(s)

5.

Prospects go with a competitor because they've heard you're slow

You can deliver services faster by establishing standardized processes, implementing workflow automation, and structuring your team to specialize in handling specific types of requests—instead of making everyone a generalist.



Part 2: The Silos of Chaos



Are you working in the Silos of Chaos?

Respond to the statements below to find out.

N There's no centralized database with all customer data. **Y**

N We have no visibility into customer hand-off from one department to another. **Y**

N Customers often complain their issues get lost. **Y**

N Double work is often performed due to lack of visibility. **Y**

If you answer **'yes'** to any of the above, you're probably suffering from something we like to call the Silos of Chaos; information is stored in different places, the hand-off from one task to the next doesn't happen smoothly, and systems don't speak to each other.

Unless processes are established, most companies naturally gravitate toward the Silos of Chaos. It's easy to let it happen, but it doesn't create a scalable foundation.

Working in silos diminishes visibility into vital information running through your business. One of your technicians might know a customer needs service, but if it's not documented in a way that holds people accountable, it may fall through the cracks. It's all on you to keep things running.

That's a lot of pressure for one person (or even a couple of people). When was the last time you allowed yourself or your right-hand people to take a real vacation? One without checking email, participating in conference calls, or responding to text messages from the office?

When you're the sole keeper of information, you don't get many opportunities to truly recharge. You're always on call. Anyone could need access to any part of your brain, at any time.

Neuroscience suggests this negatively affects your overall health and well-being. Nevermind the fact that you (and your team) actually become far less effective the longer you go without a break.





Disengaging increases brain activity.

We know this, but we're not doing it. Recent studies suggest that 69% of executives and 55% of workers are failing to unplug from the office while on 'vacation.'*

So what's holding you back? Probably the fact that you're the glue that holds your office together. If you're not there, no one can answer important questions. You're the only one who has been there long enough to know all the big stuff.

It's not healthy or scalable for one or two people to hold all the knowledge needed to keep your business afloat. It's necessary to create smart workflows that will drive accountability to best practices, so even if you take a day off, your business can function without you.

Step out of that vacation-less role, and step into peace of mind. In this day and age, there are systems and tools to help you manage your business even more efficiently and effectively. They can drive accountability to the processes you establish, and keep you in the loop every step of the way.

With business process automation, can you unplug, take that vacation, and know that your business will still be thriving when you get back.

5 Ways to Improve Your Efficiency and Productivity in the Office

Automation platforms can help you gain efficiency, but you can amplify the benefits gleaned by following best practices before you implement a business process automation platform. Start applying these 5 efficiency and productivity-boosting practices now:

*Mirabella, Lorraine, "Workers rarely unplug from the office," The Baltimore Sun, 2014.

1. Communicate Clearly

To ensure nothing falls through the cracks and there are no misunderstandings, say what you need to say in as few words as possible.

It's easy to get into the habit of writing mile-long emails, but those can be the biggest sources of confusion. Instead, urge your team to use their words more sparingly. Provide examples of what you believe to be great communication. If needed, you can even go so far as to create templates for certain types of communication.

In addition, make sure your team confirms what the client is requesting before they begin working toward a solution, especially if it's a complicated request.

Whether you're communicating directly with a client or a colleague, clearly and concisely responding to and confirming requests will help your team resolve issues faster.



2. Plan to Succeed

Not knowing where to start on a project can feel paralyzing. Before diving in to big implementations (internal or otherwise), identify the steps to success. By breaking down each step in the process, you'll make it easier to delegate, if needed, and meet milestone deadlines.

For projects or implementations that are likely to repeat, be sure to document the process so others can follow it later. Having these processes documented will especially come in handy when the time comes to manage them with an automation solution, which you can use to trigger automated reminders and notifications.



3. Prioritize Effectively

Everything is important. And when everything is important, how do you decide what to work on next? It's random. Instead, set criteria for what constitutes a priority. Whether it be a work stoppage, full system outage, or data center meltdown, your techs need to know where to focus their attention first.

Define what constitutes an urgent request vs. what can wait a few days. In a client's mind, everything is urgent, but your team needs more manageable metrics and service categories.

Once priorities are identified and categorized, have employees go one step further by estimating how much time it will take to resolve an issue and block out time on their schedule to work on the request.

4. Drive Accountability & Curb Procrastination

It's easy to put off boring projects. By giving managers visibility into what employees are working on, they can ensure important service requests aren't being pushed to the back burner.

And if priorities do get moved to the back burner, your managers will be able to see that they've been moved, ask what happened, and use the mistake as a teachable moment for a course correction.

You may find that some priorities are too big for one person to handle alone. Sometimes the solution is triaging. Other times, you might find that newer employees need more experienced team members to break down complicated requests into manageable steps. Either way, visibility into what each employee is working on will give you the information needed to proactively coach and mentor your team.



5. Delegate

If you're finding it hard to achieve work/life balance or unplug from day-to-day activities in favor of more strategic projects, it might be time to delegate. No one can do it all. And as you begin to scale your business, you're going to need to hand more and more activities off to others. Why not start now?

Explain the scope. Verify the employee understands what you're asking for. Give the employee a deadline, and then review the employee's work to ensure quality before they run with it.

By doing this in the early stages of your business, you'll already know which employees might make great leaders when your company is ready to grow again. They gain valuable experience, and you'll have someone who has the basic knowledge to assume a leadership role when the time comes.



Part 3: Learn How Business Process Automation Benefits You



Make the Most of Existing Resources

In business, we always think about how to do more, do it better, and do it without eating into our profit margins. Technology companies that have been successful have learned how to be leaner—creating efficiencies and running a tight ship.

What are you getting out of your existing team members? Every industry expert will give you a different number, but generally, you need to get more than double what you're putting in.

Billable resources should bring in at least **2.5 times** what you're paying them.

SALARY X 2.5
=
EXPECTED ROI



Labor is one of your biggest expenses.

If it costs you \$40,000 per year to add an additional team member, that person needs to produce \$100,000 in value in order to keep your profitability where it needs to be. That's a tall order.

A business process automation solution can help. What's that? It's a software that helps you automate repeatable tasks, ensuring they're done correctly the first time, every time.

In a nutshell, a business process automation solution can help you get more value out of each employee, freeing each of them to trade repeatable administrative tasks for more interesting projects.

By adding automations that remove manual tasks no one really enjoys doing, you can free your team to focus on producing more revenue. And if doing so helps you avoid adding another \$40,000 employee (even if just for the time being), you'll end up saving a bundle—even after factoring in the cost of buying and effectively implementing a business process automation solution.



Learn How Automation Benefits Your Business



How Automation Benefits Your Business

Automation can help with numerous processes, but it's not intended to replace people. Instead, it's meant to offload menial manual tasks from those resources, so they can focus on big-picture projects.

Business process automation drives:

1. Organization

While there's a solution for just about any business problem you can imagine, all the solutions you need to run your business rarely integrate, which causes slowdowns. If information is everywhere, and systems don't share data, your team has to hunt down information in multiple systems.

Business automation changes all that.

When all of your solutions seamlessly share/update information, you'll never have to worry about which application holds the most current information. They'll all be current and unified, so your team can find the customer information they need in seconds rather than hours or days.



2. Efficiency/Productivity

Who doesn't want to do more with less? By leveraging automation, you can remove double-data-entry burdens, introduce smart workflows that route requests where they need to go, and gain better visibility into how much time your team is spending on any given task. This frees up time to focus on growing your business.



3. Communication

Poor communication can lead to a bad customer experience. When customer requests get lost and interdepartmental hand-offs are rocky, it's tough to deliver a first-class experience.

A business automation solution keeps your team on track. Intelligent workflows centralize information and ensure nothing falls through the cracks.



4. Process

Documented, repeatable processes can help you scale. And while it's certainly challenging to drive accountability to new processes, business process automation can help. With pre-determined workflows and best practices, such a solution can help your team more efficiently deliver excellent service.

5. Visibility

When each employee manages out of their own personal spreadsheet, it's nearly impossible to gain a holistic view of how your company is doing.

The first step to gaining visibility into your company's performance is developing (and holding accountability to) processes that drive data centralization. A business management platform helps by enacting processes built on best practices.

So, instead of hoping your business is doing well, you'll be able to pull detailed reports that show performance in each area of your company—technical support, billing, customer service, sales, and so forth.



6. Accountability

Would you know if your techs were deleting tough customer requests they didn't want to work on? Most solution providers wouldn't, and that's a scary thought. With no paper trail to audit, what's to stop your techs from doing this?

On top of that, we're all human. Accidents happen. At some point or another, everyone has deleted an important email they wish they hadn't.

Automating business processes can help reduce human error. Automation solutions give you complete visibility into every action performed, so you can see precisely where something went awry and why.

Determine What's Costing Your Business the Most

Before we can jump into the types of solutions you should be using to solve the efficiency problems in your business, you should first put down a benchmark. Where are your biggest pain points?

Interviewing employees is a good way to start identifying which activities they spend the most time on. How much time does the employee spend on their most time-consuming tasks every week? Note which 2 to 5 activities each employee lists as their biggest time hogs.

Once the inquiries are complete, analyze your findings for trends. Across the company, are you finding there are 2 or 3 common time leeches? Any chance those activities are repeatable and non-variable enough to automate?

Knowing what you need most will help you filter through all the marketing noise—best-in-class, most advanced, world-class, top-notch, best-of-breed, mission-critical—to home in on features that will crush your biggest time thieves.


More often than not, business process automation solutions pay for themselves because they enable your team to do more without adding additional members.

Doing more without adding headcount, that's what business process automation is all about.



Part 4: Choose the Right Business Automation Solution



The background of the page is a dark blue gradient. Scattered around the text are several white rectangular signs, each held by a stylized hand. The signs are tilted at various angles and all feature the text "BUY ME!" in a bold, blue, sans-serif font. The hands are depicted in a light skin tone with orange sleeves.

So you know you want an automation solution for your business, and you're starting to research options, but there are so many. With so many to choose from, how do you efficiently find the best one for your business?

That's the question this guide is designed to answer.

It's a more common concern than you might think. Each vendor's sales pitch sounds great, and if each does what they promise, you'll be set. But sometimes things aren't as good as they sound.

Just like a candidate interviewing for a job, vendors are going to highlight their strengths and downplay (or completely omit) their weaknesses. As a good researcher, it's your job to come to the table with a list of must-haves with which to thoroughly vet each candidate.

Throughout the entire vetting process, remember that this solution is designed to make your business run more smoothly, not add additional layers of complication.

Choosing the wrong solution today could mean transitioning to/learning another platform in less than a year. You're better off investing the time up-front to find a solution that will work for your company for the foreseeable future.

Every company's requirements are unique. Above all else, the solution must be compatible with your core systems/applications. If it's not, it almost entirely defeats the purpose of purchasing a business management platform.

Now, let's get to the nitty-gritty.

Finding the Right Solutions

There are so many automation solutions to choose from. They're popping up everywhere. But what you don't want is to be a startup's guinea pig.

Untested solutions can be disastrous for your business. While they might be delightfully light on the pocketbook at first, you'll soon exceed the cost of a more established solution with all the downtime and bugs you'll encounter. Really take your time in the evaluation process. It'll save you time and frustration later.

Can't I just build my own?

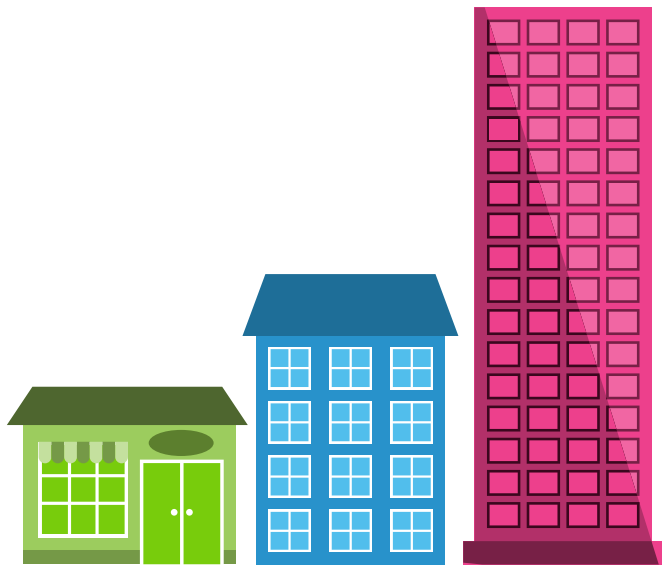
Yes, you could, but trying to produce a business automation solution in-house can cost more than it's worth. Bottom line, is it really worth the time, effort, and people it will take to run, debug, and advance such an internal system?

Many companies soon find it's just not worth it to build their own business automation system from the ground up. It always takes a backseat to revenue-producing projects, and before they know it, their internal automation system falls into disrepair as their company grows, which makes it hard to effectively scale. You want to gain stability as you grow, and a buggy platform hinders that.



5 Areas to Consider When Evaluating Automation Solutions

Your company's specific areas to evaluate may be broader than the following, but these 5 areas will give you a good starting point.



1. Size

Whether you consider your business to be small, medium, or large, it's important to verify that the business automation vendors you're considering can successfully support a business like yours. Ask for case studies. Some vendors will even let you speak with an existing customer. Take advantage of that.

It's important to note that not all business management solutions are designed to work well for a company of any size. Some are better for global enterprises, while others are better for small, single-location businesses.

2. Projects

What do you do? Are you 80% break/fix and 20% managed services? Do you mostly focus on complicated, one-off infrastructure installations? Do you manage short-term and long-term projects or one type over the other? Whatever your focus areas, it's important to verify the solutions you're considering can support those types of projects intuitively, without painful workarounds.

Ask for proof of performance. A demo might be the best way to go.





3. Sales Volume

The last thing you want to do is implement a shiny new system that's soon crippled by the weight of your sales volume. The whole point of this system is to increase your company's efficiency. Make sure the systems you evaluate have the tracking, categorization, and hand-off features your team needs to turn leads into closed deals.

4. Quality

What features can the vendor offer you to ensure projects stay on time and on budget—or at least warn you when something is at risk of going off-plan? In addition, how does the solution help you ensure clients are always in the loop on important decisions? These are two big considerations when trying to build a great customer experience.



5. Regulatory Compliance

If you support sensitive agencies in government or healthcare, you're held to higher standards than most—SOX, HIPAA, etc. At the drop of a hat, you could be required to produce proof that you're keeping sensitive data safe. Make sure the solutions you're evaluating can provide the data analytics and security functionality needed to support regulated industries.

Organizations with an integrated business management platform see an average **27% profit margin** on projects.*

When it comes to your business, you want to know you'll have the support you need to keep everything running to your standards. Do a little research, read reviews, ask peers about the pros and cons of solutions they've used. Every business model is unique, so it's going to require a bit of digging to find the right automation platform for your company.

So, what kinds of solutions help you do this?

There are a number of automation platforms that can help you run a tight ship. For a more in-depth look at some of the ways these solutions can benefit your business, check out [5 Ways to Improve Your Efficiency & Productivity in the Office](#) covered in Part 2 of this guide.

1.

Communication

2.

Planning

3.

Prioritizing

4.

Procrastination/
Accountability

5.

Delegation



Remote Monitoring & Management (RMM)

This tool enables you to remotely access, update, and provide routine device maintenance. As much as you might like to, you can't be everywhere at once. But an RMM, like LabTech®, equips you to be everywhere it's installed, so you don't have to hire more engineers to keep pace with geographically dispersed new customers. You're instantly able to identify and resolve problems from the comfort of anywhere, enabling you to monitor all client sites more efficiently.

Business Management Solution



Serving as the operating system for your business, a business management platform—like ConnectWise®—organizes your business around one system to centralize information related to service delivery, sales, projects, billing, and more.

So now, instead of hunting through emails to find an old customer invoice or service request, you can easily search for it within a centralized database that makes housing and neatly organizing customer information a cinch—putting any employee just a few clicks away from providing outstanding customer service to any client.



How is this different than a professional service automation (PSA) solution? It offers more.

More training, more integration, more future proofing. Unlike a PSA, the ConnectWise business management platform comes with a community of users you can plug in to, training you can leverage to ensure you're getting the most out of your instance, and a roadmap designed to solve tomorrow's challenges.

In a nutshell, a business management platform (BMP) is way more than just a PSA.

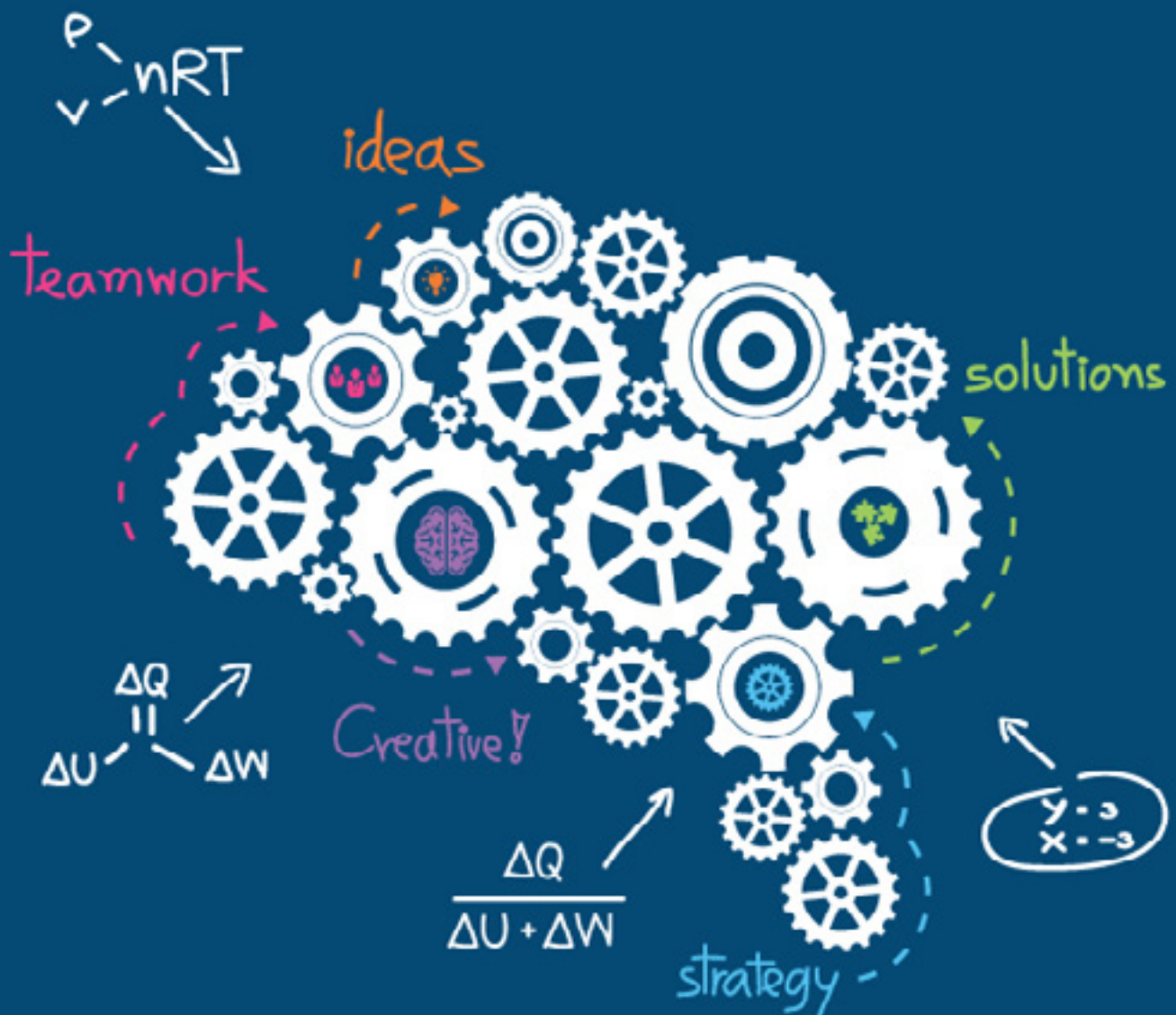


Quote & Proposal Automation

Quote and proposal software—like Quosal®—puts dynamic templates, guided selling, and live pricing feeds right at your sales reps' fingertips. It streamlines the once-painful process of building quotes and proposals, and gives both the sales rep and management team visibility into the entire sales cycle.

The mix of solutions you choose will depend on your business needs and fit. Some technology companies feel they only need one or two of these solutions, while others require all three. The great news is that many of the aforementioned solutions are designed to integrate, which immediately amps up efficiencies.

Part 5: Where Do I Begin Automating Processes?



Questions to Ask Before Automating Processes

Start with a big-picture approach. Holistically identify what it is you're hoping automation will help your business achieve. Leave the small, tactical stuff for later. Review how your processes work today. Your business is an ecosystem, and before you can find the right solution to make it run more efficiently, you need to gain a broad understanding of how everything connects.

What processes are dependent on others? How do you collect and serve up business intelligence? How do you accept payment from clients?

Once you have a high-level understanding of how your processes work, then you can take the next step to make your business or



What to Automate First

Rome wasn't built in a day. Don't try to automate more than you can handle. Start small. It'll take time to build and tweak workflows to meet your company's specific needs. These solutions will come standard with hundreds of workflows and integrations. But you need to decide which you want to turn on, which you want to customize, and what you want to build from scratch.

It's a process. Don't take it all on at once. Create a plan. Try a small area. Test it. Garner feedback. Once that's in good shape, go on to the next item. It's best to go in with a roadmap, knowing what you wish to accomplish (and in what order).

Many times, the automation vendor you select will offer consulting and onboarding to get you up to speed using their software. During this onboarding, they can help you adjust your plan to be a little more risk averse or aggressive—depending on when you're hoping to be fully transitioned over to the new system.

Automation Isn't the Answer to All Your Problems

You can have the best automation systems the world has to offer, but if you don't build documentation and processes around it, you're selling yourself short. Once your automations are built, it's time to switch to 'refining mode.' Keep your systems alive by continuing to update them to meet your company's evolving processes and needs. The more work you put into your systems, the more rewarding they will be in the long run.

Change Management

Change, even the good kind, is stressful. People don't want to change. It means adapting to something new. This makes change management a vital role that's part internal relations and part educator.

Employees need to know up front how they stand to benefit from a change. If you're thinking about adding an automation solution to your practice, start thinking of specific ways each job role within your organization will benefit from this new software.

Share early (and often) the value each role within your organization will gain as a result of adopting automation. Executives should gain better visibility and actionable data; managers should gain the control to ensure employees complete tasks to the company's standards; and, individual contributors should benefit from well-defined processes to follow, elimination of mundane tasks, and increased productivity.

Getting buy-in is essential you'll find the transition to be harder than it needs to be for automation before you do it. You'll be glad you did.



About ConnectWise

ConnectWise® transforms how technology solution providers successfully build, manage and grow their businesses. Through the ConnectWise® Business Suite™ – a comprehensive set of award-winning solutions that deliver a seamless user experience – ConnectWise gives its partners the ability to increase productivity, efficiency and profitability.

Just as importantly, ConnectWise's relentless commitment to innovation and unparalleled passion for partner success assures its partners have comprehensive business support through every step of their journey. Today, more than 100,000 users in over 50 countries take advantage of the competitive edge that comes from ConnectWise solutions and its powerful network of ideas and experts.

For more information, visit **ConnectWise.com** or call **800-671-6898**.

