

MSPBOTS

The Role of MSPbots in Enhancing Visibility at Expedient Technology Solutions



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Introduction

Founded in 2004, Expedient Technology Solutions has established itself as a leading cybersecurity-focused Managed IT Services Provider in the greater Dayton and Cincinnati region.

As many MSPs do, they faced significant challenges due to their rapid growth and data-intensive operations. Their ability to verify the accuracy and efficiency of their automated processes became a primary concern.

The need for reliable, efficient, and accurate data management and process verification led them to MSPbots. Through MSPbots, Expedient Technology Solutions began verifying their operational processes where they uncovered and corrected inefficiencies through advanced reporting, widgets, and automated bots. This scalable solution aligned effortlessly with their growth, enabling their goal for an evolving, efficient system.

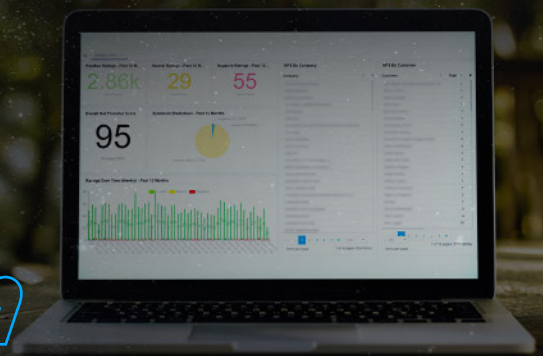
Evolving Company Goals

As a data-driven organization, Expedient Technology Solutions relied heavily on the data they've generated to shape strategic decisions, guide direction, and ensure profitability.

Internal Systems Manager Jeff Lehman reflected on the initial goals and the transformation of the company's objectives, "I started in our NOC department, and I was also taking care of our internal systems."

The company was accelerating very quickly. This fast-paced environment underscored the need for effective data management:

“**The need to get the data to the right people is very important. We want to be able to look back and see how we did, how we're performing, what we've done, and capture information.**”



As the company grew, so did their goals. However, there was a sense of uncertainty: "We think we're doing this. We think we're doing that. But all those things that we wanted to do goal wise took a long time to verify."

This led to seeking definitive solutions. "How do we go verify we're doing the right things?" Jeff asked. The application of MSPbots marked a significant turning point.



The Search for a Solution: Discovering MSPbots

After a demo with MSPbots' CEO, Daniel Wang, Expedient Technology Solutions saw what MSPbots had to offer. They found that the platform not only provided the solutions they were seeking but also highlighted gaps in their existing processes.

Jeff explained the limitations they faced with their previous platform. "A lot of times, you had to compare three different sets of systems for information... The conditional language wasn't accurate," he noted.

He elaborated on the practical implications of these limitations, particularly in terms of agreements profitability. "Looking through to see, 'Are we including this?' And we have some exceptions where for some clients, this is included, that's not included. Or we might have called it one thing here and not another, and this one internally. So, we had to compare and then know in this case it was called this," He explained.

Because of the constant challenge this posed, they switched to MSPbots. "With MSPbots, you could do all sorts of statements and conditions. We just couldn't get all that information to pull inside of BrightGauge, but with MSPbots, we could really narrow it down quite easily."

Jeff added that achieving desired outcomes often required external support. "I was always reaching out to [BrightGauge] support saying I'm trying to do this. I can't do it and they'd go build it for me, but I wouldn't get the help I needed to teach me how to do it."

With MSPbots, the learning curve was swift and empowering. "With a couple of remote sessions, I've been able to figure all that out."

MSPbots also provided timely support. **"If I get a request from anyone in the company, I can have it built in no time with MSPbots."**

This was a contrast from BrightGauge's usual response of "Let me see if I can do it." With MSPbots, the approach shifted to a confident, "I know I can do it. Give me a little bit and I'll have it for you." Apart from the assurance that they were getting the reports they needed, MSPbots offered a variety of presentation styles like pie charts and grids which enabled diverse and effective data visualization.

The simplicity and efficiency of MSPbots immediately resonated with the company. Ultimately, Expedient Technology Solutions found a scalable solution that grew with them: "We're not having to go maintain it because we set it up right and your solutions offer that and grow with you."

Comparative Analysis:

MSPbots vs. BrightGauge

To highlight Expedient Technology Solution's experience with BrightGauge and MSPbots, here's a comparative list:

CAPABILITIES	MSPBOTS	BRIGHTGUAGE
Consolidate data from multiple systems into one	Streamlined	Required cross-checking
Conditional language	Advanced; accurate and flexible	Simple
Agreements profitability analysis	Nuanced; handled exceptions and different terms	Difficult to configure
User-empowered learning	Provided guided learning that leads to independence	Would need dependency on external support
Response to data requests	Quick and confident	Delayed and hesitant
Presentation style	Diverse	Limited
Scalability	Did not require maintenance	Required maintenance

Achieving Goals with MSPbots

Business Intelligence Dashboards

Jeff faced common challenges when switching to a new technology. “When I'd added a dashboard, it always went to the bottom of the list,” he recounted. His fix then was to plan the sequence of dashboard implementation.

These initial challenges were soon answered with MSPbots' responsiveness to user feedback—app updates announced in series of Release Notes. “You can [now] pick and choose where it goes,” he noted. “Great improvements there, makes it super easy to build and add.”

The journey started out with overcoming initial obstacles but led to exploring and mastering the platform's capabilities. “I've just learned a little bit through trial and error for building, styling, designing,” Jeff shared. Soon, he was able to tailor the dashboards to their team's specific needs. **“We've worked with support a little bit just to find the right type of design too, but overall, it's very easy to build.”**

The platform also marked a significant shift in how they approached data visualization and analysis. Apart from making full use of Agreement Reviews and Agreement Gross Profit in MSPbots' Financial Suite App, they found the Client Reporting and Billing Reporting instrumental.

One implementation highlighted was in tracking metrics. “We do what's called a customer survey score (CSAT) and we rate our customer satisfaction,” he explained. MSPbots enabled a unique color-coded system to represent satisfaction levels. “If a customer is very satisfied, we use a unique color. So, we can quickly see how satisfied our customers are with us,” Jeff noted.



MSPbots also improved how the company managed their internal workflow. “We look at what departments are getting the most email tickets in,” he explained. This analysis was crucial for operational efficiency. “By looking at the pie chart, we can determine staffing needs in various departments,” he said. The use of color in these pie charts provided a quick, intuitive understanding of data distribution and departmental workload.

Bots

The implementation phase also saw the integration of bots, a feature that automated various operations. Jeff detailed, “We use a bot for firm appointment reminders... and for ticket management in the morning and afternoon.” These bots ensured timely reminders and helped with efficient ticket resolution. They played a role in sales order management and service ticket handling, areas crucial for client engagement and operational efficiency.

Jeff particularly emphasized the impact of these bots on management practices. “It really helps us focus a lot of the things that management would have to go back in and correct or adjust.” This automation alleviated a significant burden on the management, allowing them to focus on more strategic aspects of the business.

Jeff noted enthusiasm among the tech team for certain bot functionalities. “They love the scheduled appointment one,” he shared. The reminder feature was well-received: “If they’re running behind, they’re like, ‘yeah, yeah, I know. I know.’ But it does help them keep track of that.” This functionality proved invaluable in ensuring that no tasks were overlooked and in maintaining the team’s awareness of their responsibilities.

While some team members were still adapting, the bots had been instrumental in helping them maintain better control over their tasks. “Some are like, ‘OK, I did it again’ – it’s a hard habit to get out of sometimes, but it is a good reminder for them.”

With the bots deployed, following processes had improved and oversights had reduced.

Next Ticket

Expedient Technology Solutions had been gradually using Next Ticket to suit their distinct dispatch system. Jeff described that they have a triage board that everything comes into and then the tickets get dispersed between the departments. This initial step ensures that each ticket is categorized appropriately.

Once a ticket is allocated to a department, they plan to fully integrate Next Ticket. The goal of this approach is to prioritize efficiently. “We are automating some of our automated boards to tell us which ones are the priorities, so we aren’t cherry picking the easy tickets,” he explains. This method has already yielded positive results, particularly in their cybersecurity operations: “We’ve got a great SLA on our Cyber Security Board because of Next Ticket.”

Gradually adopting Next Ticket across various service boards has led to tangible improvements, as Jeff noted, “This has resulted in better response time and reduced labor costs,” demonstrating a smart and effective application of automation in their workflow.

Best Practices Derived from the Client's Experience

Engage and Inquire



One of the key practices Jeff emphasized was the importance of inquiry and communication: “Don't be afraid to ask questions.” He recounted an instance that led to unexpected results. “I learned that there were some differences in the way that MSPbots qualified time,” Jeff said. This realization came through proactive engagement rather than passive troubleshooting. “One simple change fixed everything,” he discovered after reaching out for support.

Learning from Experience



Jeff shared his journey of understanding specific features like the client slicer and time filters, emphasizing the value of learning from migrated widgets and dashboards. This practice underscores the benefit of hands-on experience and learning directly from practical use cases.

To supplement the live support options MSPbots offer multiple channels to aid familiarization of the functions within the platform: blogs, knowledge base articles, training videos.

Permission Planning



Setting appropriate permissions from the outset is also important. “Build that as you set it up,” Jeff had emphasized. This proactive approach to permissions ensures that the right people have access to the necessary data and tools, enhancing both security and functionality.

Strategic Tagging



“We have 150 dashboards, 1150 widgets—that's a lot for some people to remember,” Jeff explained. By tagging dashboards and widgets by department, user, or role, they made it easier for team members to find and access relevant information. “Build that as you go,” he advised, highlighting the ease of this approach.

Proactive Platform Layout



Finally, Jeff advised, “Plan out your MSPbots platform, layout how you want it to work. If we need to go in and make an adjustment, we can find it very quickly and go edit that system as well.”

These best practices revolve around proactive engagement, clear communication, thoughtful setup, and strategic organization. These practices streamline the user experience and maximize the platform's effectiveness, turning MSPbots into a powerful tool in the hands of its users.

Achieving Goals with MSPbots

Expedient Technology Solutions' success with MSPbots goes beyond using new technology, it demonstrates their readiness to adopt innovative work practices. As reflected in Jeff's insights, a willingness to engage in a learning process and experiment through trial and error were crucial in creating an ecosystem that improved efficiency and fostered growth.

Jeff has described the substantial time savings and efficiency gains that resulted in this implementation.

The use of various tools within MSPbots has been game-changers. This adaptability and expansion of functionalities, from integrating SQL connections to exploring new apps, have been key in their continued growth.

Jeff's advice to others is grounded in his positive experience: to deploy a blend of strategic planning, hands-on learning, and smart customization. MSPbots is a platform that evolves with its users, allowing for clear insights into their data.

Book a demo or sign up for a free trial now and start transforming your data visibility today!