

# Managed IT Best Practices: Lead Generation and Onboarding



LET YOURSELF **GROW**

## About Me



Director of Sales





# Agenda

- Lead generation
  - Build the pipeline
  - Leverage sales reps
  - Implement marketing
- Onboarding
  - Gather information
  - Build a plan
  - Manage execution
  - Communicate expectations



# Assumptions

Value Creation  
Strategy

Target  
Customer  
Profile

Technology  
Stack

Packaging and  
Pricing

Differentiation

Roles and  
Responsibilities

Sales and  
Onboarding  
Capacity





## Pipeline of Current Customers

- Management builds “hot list”
- Reps identify 10 accounts
- Service identify 10 accounts
- Introduce at account reviews
- Introduce after copier/print installs
- Mine your database



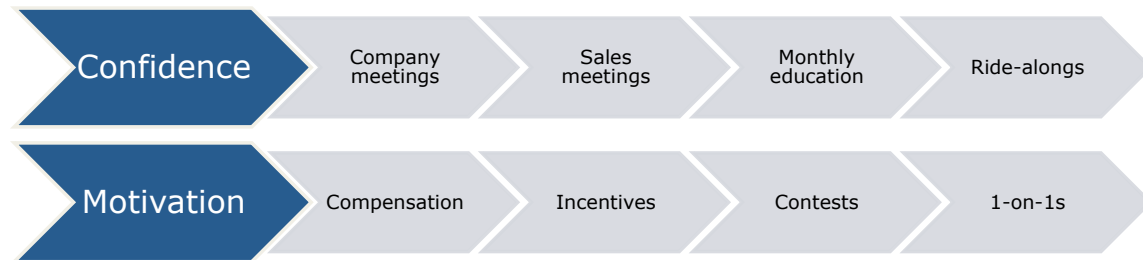
## Pipeline of Prospective Customers

- Management identifies hot list
- Reps identify 10 “lost” accounts
- Purchase a list
  - Sort by size and industry





## Sales Rep Lead Generation



## Thought Leadership Marketing

- Lead warming process
  - Differentiate
- Lead nurturing process
  - Educate
- Lunch and learns
- Webinars
- “Big” event

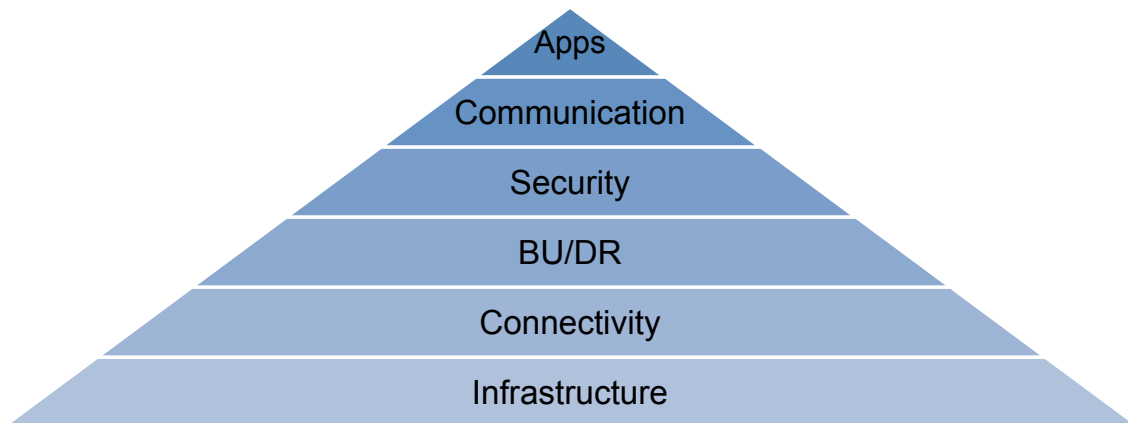


# Onboarding Best Practices



LET YOURSELF **GROW**

## Required Information





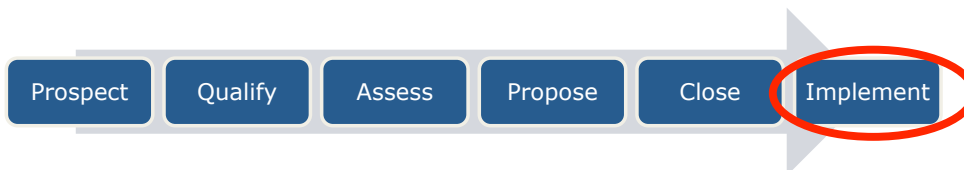
## Pre-Sale Information

- Infrastructure outside tech stack
- Environment compared to minimum requirements
- Elements that will hinder performance



## Post-Sale Information

- Configurations
- Applications
- Users







- Cabling and telco
- Planning meetings
- Infrastructure
- Stabilization
- Tool installation
- Orientation



Project:			Start Date: 8/12/15																													
Provide			Completion Date: 10/1/15																													
Collabrace Onboarding Project Plan				Aug 10, 2015				Aug 17, 2015				Aug 24, 2015				Aug 31, 2015				Sep 7, 2015												
Activity / Task Name	Assigned To	Start Date	Finish Date	Mon	Tue	Wed	Thur	Fri	Sat	Sun	Mon	Tue	Wed	Thur	Fri	Sat	Sun	Mon	Tue	Wed	Thur	Fri	Sat	Sun	Mon	Tue	Wed	Thur	Fri	Sat	Sun	
Project Duration		8/12/15	10/1/15																													
Cabling and Telco Tasks		8/12/15	8/13/15	:	:	:	:	:	:	:																						
Task 1		8/12/15	8/13/15																													
Task 2		8/12/15	8/13/15																													
Task 3		8/12/15	8/13/15																													
Task 4		8/12/15	8/13/15																													
Task 5		8/12/15	8/13/15																													
Task 6		8/12/15	8/13/15																													
Task 7		8/12/15	8/13/15																													
Task 8		8/12/15	8/13/15																													
Pre Implementation Call		8/12/15	8/12/15																													
Subscriber Information Tasks		1/26/15	1/27/15																													
Complete Configuration Form		8/26/15	1/24/15																													
Review Configuration Form	Collabrace	1/26/15	1/26/15																													
Provide Clarification		1/27/15	1/27/15																													
Final Configuration Form Acceptance	Collabrace																															
Task Delay - Schedule Change																																
Infrastructure Tasks		12/15/14	3/8/15																													
Fortinet - UTM		9/3/15	3/8/15																													
Pro Configuration	Collabrace	9/3/15	9/3/15																													
Dellware - UTM		9/7/15	9/7/15																													
Onsite Configuration	Both	9/8/15	9/8/15																													
Task Delay - Schedule Change																																
Data Protection		12/15/14	1/6/15																													
Order Data Protection - BDR	Collabrace	12/15/14	12/15/14																													
Delivery - Data Protection - BDR		1/6/15	1/6/15																													
Configuration Data Protection - BDR	Collabrace	1/6/15	1/6/15																													
Configuration Data Protection - File B	Collabrace	1/6/15	1/6/15																													
Task Delay - Schedule Change																																
New Hardware		8/11/15	3/8/15																													
Order New Hardware		8/11/15	8/11/15																													
Stage Hardware		8/26/15	3/17/15																													
Deploy Hardware		9/8/15	9/8/15																													
Task Delay - Schedule Change																																
RMM Stabilization Tasks		1/7/15	1/12/15																													
Uninstall AV		1/7/15	1/7/15																													
Install M-able Agent		1/7/15	1/7/15																													
Install AV Defender		1/7/15	1/7/15																													
Complete Stabilization (Servers & Workst		1/7/15	1/9/15																													
Verify All Stabilization Work	Collabrace	1/12/15	1/12/15																													
Task Delay - Schedule Change																																
Hosted Email Tasks		1/5/15	1/15/15																													
Create Account and Mailboxes	Collabrace	1/5/15	1/5/15																													
Complete Data Migration		1/14/15	1/14/15																													
Mail Cutover	Collabrace	1/15/15	1/15/15																													
Final Account Configuration (Additional	Collabrace	1/15/15	1/15/15																													
Task Delay - Schedule Change																																
Subscriber Orientation & Service Act		1/9/15	10/1/15																													
Service Orientation Meeting		1/9/15	6/24/15																													
Service Activation	Advanced Imaging Solution	10/1/15	10/1/15																													
Proof Completion	Both																															
Task Delay - Schedule Change																																



## Best Practices

- Project lead
- Internal weekly progress meetings
- Weekly customer communications
- Internal debrief
- Customer survey



## Internal Rollout

- HLO
- Anomalies
- Service exceptions
- Missing information
- VIP users







# External Rollout

- Contact information
- SLA
- Processes
- Invoicing
- 30 day review



# Thank You

Lindsay Dick

[ldick@collabrance.com](mailto:ldick@collabrance.com)

319-261-4166



LET YOURSELF **GROW**