

BERING MCKINLEY IT FIRM CHECKLIST

Utilize this checklist as a "to-do" across the entire organization. When you're wondering what to work on next, reference this tool.

SERVICE

- **Dispatch model is firmly in place.** You've chosen and documented between Centralized Dispatch or Priority Based Dispatch.
 - Dispatcher, if appropriate has been hired, trained, reviewed, and empowered.

- **Established Service Catalogue**
 - Service Offering
 - Security Offering
 - Hourly Rates
 - Resold Cloud Services
 - Project Service Delivery

- **Service to Sales Training**
 - Mastery level comprehension of our offering
 - Pricing
 - Client benefit
 - Profitability metrics

- **Hourly rate targets set for all levels at a 5.6X multiplier**

- **Mastery of time entry.** Time is entered as work is completed. Service manager or dispatcher is well equipped to enforce the time entry policy

- **Service ticket statuses are defined.** Staff is trained on appropriate status selection. Service boards are free of incorrect statuses

- **Service ticket closure process is well documented**
 - Time correct
 - Proper agreement selected
 - Adequate notes
 - Resolution is accurate and appropriate

SERVICE (continued...)



- **Weekly time submission occurs by 5pm every Friday**
- **Weekly time approval by service manager or dispatcher occurs by 10am every Monday**
- **Dashboards are built and maintained.**
 - Major Metrics are defined and trained upon
 - Achievement of metrics defined
- **Client loyalty method is in place and consistently executed**
 - Companywide meetings to review results
 - Follow up process with red flag clients is in place and followed
- **Service tickets all have configuration items selected**
- **Service personnel reviews are performed quarterly**
 - Management by Objective (MBO) is documented and understood by managers and staff
- **Job descriptions are in place and accessible by staff**
 - Referenced during MBO reviews for career planning
 - Each level of technician
 - Service dispatcher/coordinator
 - Service manager
- **Cost of Living Adjustment (COLA) system is in place and understood by all staff**
- **Certification needs of the company are defined**
 - Understood by staff
 - Certification path well understood by employees
 - Certifications are documented in PSA
 - Certification needs of company are reviewed annually
- **Expense entry and reimbursement policy and procedure is documented and followed**

SERVICE (continued...)



- **Effective Hourly Rates (EHR) are measured for Agreements, Department**
 - Management understands the significance and impact
 - Reported monthly.

- **Member cost is configured in PSA with a 1.12 multiplier.**

- **Agreement Gross Profitability (AGP) exceeds 65%**
 - Management understands the significance and impact
 - Reported monthly

- **Service Department Gross Profitability exceeds 55%**
 - Management understands the significance and impact
 - Reported monthly

- **Service salaries do not exceed 33% of service revenue**
 - Management understands the significance and impact
 - Reported monthly

- **Remote Monitoring and Management (RMM) tool is maximized**
 - Plan for monthly improvement in place
 - At least one employee (non-owner) has mastered the tool OR
 - Outsourced administration of tool

- **Backup platform is standardized across portfolio of clients**
 - At least one employee (non-owner) has mastered the tool.
 - Backups are regularly verified
 - Test restores are regularly scheduled and performed on each client

- **Professional Service Automation (PSA) is configured with**
 - Correct service boards or queues
 - Views are configured
 - Workflow automation rules are configured and running properly
 - Charge codes for time entry
 - Rates are entered accurately

- **Outsourced relationships established, managed, and reviewed**

SERVICE (continued...)



- Onboarding and Offboarding templates configured, managed, and reviewed**
 - Employees
 - End Users
 - Clients
 - Licensing

- Service Level Agreements (SLA's) are defined, measured, and met**

- Priority of client issues is defined, shared, trained, drilled with staff and clients**

- Documentation of client networks is complete, accurate, up to date**
 - System in place to ensure new clients are onboarded with documentation check list

- Daily Huddle is performed every work day at the same time**
 - 15-20 minutes
 - Not for solving problems, identification and awareness
 - What's up
 - Where are you stuck

- On call rotation and policies are established and published to staff**

- Ticket creation only occurs by dispatcher or backup**

- Phones do not ring in a group to billable staff**

- Clients do not call billable staff on cell phones**

- All service related issues are communicated closed loop within the ticket**

- Service to client is not performed until a ticket is created**

- Owner is not engaged in ticket work**

SERVICE (continued...) 

- Sales to service handoff is established and in followed.
- License reconciliation standard established and followed.



Continue to Sales below

SALES



- Salespeople are employed by the company
- Sales roles are clearly defined
- Account Managers are employed by the company
- Account Manager role is clearly defined
- Quotas are established
- Job descriptions are created for each of the 5 sales roles
- Compensation plans are created for each of the 5 sales roles
- Sales module is properly configured
 - **Activities**
 - Types
 - **Opportunities**
 - Type
 - Close date
 - Next step
 - Budget
- **Daily sales huddle is performed every work day at the same time**
 - 15-20 minutes
 - Not for solving problems, identification and awareness
 - What's up
 - Where are you stuck

SALES (continued...)



- **Weekly sales meeting is scheduled and followed**
 - Opportunity update
 - Quota review
 - Activity level reported

- **Commission calculator is created, implemented, and accessible 24X7 to all sales staff**
 - Earned
 - Owed
 - Paid

- **Commission payout schedule is created and implemented**
 - Report
 - Review by sales staff and management
 - Adjust
 - Approve
 - Pay

- **Sales manager or owner spot checks opportunities monthly**
 - Impromptu call to prospect introducing self and checking on deal progress

- **Sales manager sits in on sales calls**
 - Early stage – every
 - Late stage – sporadic or at the request of sales person
 - Report card created and implemented at these meetings

- **Continuous training occurs**
 - Sandler
 - Bering McKinley

- **Monthly role playing session for all staff**
 - Scenarios created and performance assessed

- **Sales time entry occurs daily, submitted weekly, approved weekly**
 - Charge codes are in place

SALES (continued...)



- Sales quoting tool is implemented and configured**
 - Connection to PSA
 - Connection to distributors
 - Standardized pricing (service) and margins (product) are established

- Sales support literature is created, accessible, relevant, helpful, regularly shared with prospects**

- Google Ad Words plan is reviewed monthly**

- Email blasts are conducted regularly and shared with sales staff**

- Web site is up to date, landing pages updated, relevant**

- Live Chat is installed and monitored**

- LinkedIn strategy is in place and tracked**

- Facebook strategy is in place and tracked**

- Key relationships with vendors is in place and followed up on monthly**

- Certification needs of the company are defined**
 - Understood by staff
 - Certification path well understood by employees
 - Certifications are documented in PSA
 - Certification needs of company are reviewed annually

- Quarterly technician shadowing is scheduled**

- Quarterly accounting shadowing is scheduled**

SALES (continued...)



○ **Defined, documented, and implemented Sales Process in place**

- Activity targets
- Opportunity targets
- Inbound vs Outbound
- Technology Business Reviews
 - Cadence
 - Defined process
 - Pre and post service call
 - Post Mortem on Projects

○ **MDF optimization**

○ **Lead Generation plan**

- Building
 - Marketing Qualified Leads (MQL)
 - Sales Qualified Leads (SQL)

○ **Sales playbook established**

- Onboarding fees
- Cross Sell/Up Sell strategy
- Discounting



Continue to Finance below

FINANCE 

○ Monthly Meetings

- P & L Review
- Balance Sheet Review
- Benchmark, Goal setting meeting
 - Managing by the numbers, Bering McKinley Targets

○ Company Credit Cards

- Management of cards
- Credit card statement reconciliation

○ Processes

- Reimbursed expense
- Receive money, and deposits
- Check writing
- Purchasing hardware/software from vendors
- Reconcile bank accounts
- Review/process AP vendor bills
- Update bank activity in financial system
- Ensure all expense reports are submitted and approved/processed
- Service time invoicing
- Agreement invoicing
- Product invoicing
- Reconcile necessary balance sheet accounts
- Payroll entry/processing/submission
- Payroll entry into financial system in a timely manner

FINANCE (continued...)



Chart of accounts meets the minimum criteria

- Account numbers
- Payroll broken down by
 - Service COG
 - Sales Salary/Commission Expense
 - Admin salary expense
 - Owner compensation
- Service revenue broken down by
 - Hourly
 - Project
 - Recurring
- Sales Expenses represent their own category
 - Sales Salaries
 - Sales Commissions
 - Sales Tools
 - Sales Meals/Travel
 - Marketing Tools
 - Marketing Expenses

Agreements are properly built to BMK Standards

- Costs
- Parent/Child
- Additions
- Congruent with current and legacy signed agreements
- Default agreement in place

Pricing increase practice in place

Agreement delta reconciliation is performed monthly

OWNERSHIP

- All necessary insurance policies are in place**
 - E & O
 - Cyber Security
 - Liability
 - Key Man

- Solid buy sales agreement in place in case of partnership**

- Written Legacy Planning**

- Financial Planning for company and owner**

- Mission/Vision/Value/Purpose Statements in place and meaningful**

- One page business plan current**

- DISC assessments in place for current team and new hires**

- Current and trending valuation**



Continue to Security below

SECURITY



○ Asset Inventory

- Enterprise Assets: Establish and maintain a current, detailed, and up-to-date inventory of all enterprise assets.
- Unauthorized Assets: Regularly review and address any unauthorized assets. Quarantine or disconnect any unauthorized assets from the network.

○ Software Inventory

- Enterprise Software: Establish and maintain a detailed inventory of all enterprise software, including unsupported and end-of-life software.
- Unauthorized Software: Review and address any unauthorized software on a regular basis. Ensure only authorized software is installed and running on enterprise assets.

○ Configuration Management

- Data Protection: Configure enterprise assets to protect data stored on them. Ensure data is encrypted, both in transit and at rest.
- Secure Configurations: Maintain a secure configuration process for enterprise assets, addressing all known vulnerabilities.
- Firewall Configuration: Implement and maintain a secure firewall configuration, filtering out unnecessary and potentially harmful traffic.

○ User Access Control

- Multi-Factor Authentication: Require multi-factor authentication (MFA) for remote network access.
- Administrative Access: Restrict administrator privileges to necessary personnel and applications. Review and adjust permissions regularly.
- Access Granting: Have a documented process for granting access to enterprise assets and data.
- Access Revoking: Establish a process to revoke access promptly when it's no longer needed.

SECURITY (continued...)



○ Security Training

- Security Awareness: Conduct regular security awareness training sessions for all staff, ensuring they understand potential threats and best practices.
- Phishing Awareness: Train the workforce to recognize and respond to phishing attempts.
- Handling Sensitive Data: Educate staff on handling sensitive data securely and responsibly.

○ Incident Management

- Incident Reporting: Establish a process for reporting and managing security incidents. Ensure timely responses and effective communication.
- Contact Information: Maintain up-to-date contact information for relevant security personnel, law enforcement, and other key stakeholders.

○ Backup & Recovery

- Data Recovery: Establish and maintain a data recovery process, ensuring critical data is regularly backed up and can be restored quickly.
- Backup Testing: Periodically test backups to ensure data can be recovered effectively.



How did you do? Need help?

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