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How to Choose a Computer Support Consultant A Consumer Awareness Guide

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Introduction

Like so many other companies, you have made a significant investment in what has become the life blood of your business, your computer systems. From workstations to laptops and servers, and from software applications to printers and Internet connection, you cannot afford to be down even for a minute. Finding a trustworthy professional to keep you running reliably and securely can be a tough and expensive exercise of trial and error and, if you are lucky, when they leave they have fixed more than they have damaged, costing you even more money in the end. This is no economy to be picking up the tab for an alleged computer professional's on the job training. You want someone that understands your needs, and knows how to address them.

All of my clients have been through this headache-inducing process. From the time they put in a request to their current IT guy for a fix, it takes days to receive a response and another few days before someone actually shows up to address the problem. The person who arrives is frequently under experienced and leaves a trail of problems in their wake. I am reminded of the old cartoons when the severely nearsighted Mr. Magoo would leave a trail of accidents in his rearview mirror as he drove down the road, not a care in the world. I am sure we've all felt this way with various vendors we've worked with over the years. Many of them are the biggest in their industry and we're left wondering how they ever got so big?

In the interest of sparing you the pain of hiring a Mr. Magoo, I offer this article with some helpful information for finding and hiring a trustworthy, competent and affordable IT support company.

The Value of Referrals

I'd never eat at a C, would you?

Once I made the mistake of telling someone that I won't set foot in a restaurant unless someone has recommended it to me. "Oh, you can't be afraid to try something new," she admonished. I just smiled and nodded as I thought to myself, it isn't about trying new things, it's about not having to pay for something I did not enjoy. Likewise, when in need of a new dentist or mechanic I always poll friends, family or colleagues who they use and if they are happy with the service. I highly recommend doing the same when it comes to getting support for your office computers. Ask other business owners in your professional circle if they are happy with their IT support company. If you belong to any local professional organizations, ask your fellow club members if they can suggest anyone. Trust me; the company they recommend will greatly appreciate the referral.

In the late 1990s a Los Angeles local news program ran a hidden camera expose on the filthy conditions of some area restaurant kitchens. Grainy video showed the most extreme violations common kitchen hygiene practices, let alone public health code. The images alone were enough to make one sick and, in the interest of not grossing you out, I will not go into any further detail of the infractions. The public outcries lead to the requirement that restaurants and even stores that sell food post the letter grade of their most recent city inspection. Virtually overnight, small white placards with big a blue A, B or, heaven forbid, C became prominently displayed in eatery windows and even gas station mini-marts all over town. One never sees a D or lower because those places must keep their doors shut until they have cleaned up their act and

passed a subsequent inspection. It is rare to see anything lower than an A and, if one did, would one eat there? Probably not. Personally I need that little blue A, that referral from the Department of Public Health, in the window as a reassurance that I won't be spending the night in the bathroom.

Similarly, you should not hire an IT provider who is not recommended by someone you trust and would not rate anything lower than an A on their virtual report card. I don't recommend trusting in online reviews from places like Yelp or Yahoo Local where it is too easy for vendors to plant bogus glowing reviews about themselves, or discredit their competition. Another reason I don't trust them is that shortly after noticing advertisements offering to pay people to write product reviews there seemed to be an uptick in customer product evaluations at various retailers. Coincidence, maybe, but I can't imagine going online to Macys.com to write a review about the underwear I bought last week whether they were comfy or not.

There are some sites that might be a little more credible, such as AngiesList.com, where consumers pay an annual fee for the privilege of posting and reading vendor reviews. Ideally, this lessens the opportunity for self-promotion and abuse, but I am not sure it is worth a monthly fee.

So, unless there is a particular vendor endorsement web site you like, I would stick with referrals from more traditional sources you know and trust.

Vetting the Candidates

If you called the first person someone recommended to you and it worked out, great! If you have a list of possible vendors that is good, too, but it is time to carefully narrow your selection to the kind of organizations that can meet your needs without draining your wallet.

If your finances allow and your organization is so large you feel only IBM consulting can support your

needs, keep in mind that large IT companies have a lot of overhead. If they boast of a thousand employees, huge customers and a big shiny office building, think of the hourly rates they'll have to charge you to maintain all that overhead.

Instead, look for smaller, local companies that are hungry for your business but have an established, satisfied clientele. You are likely to have a more personal experience as well as more of an opportunity to negotiate fees, terms, etc. Interview them just as you would a potential full-time employee. Have them provide you a list of references and even the resume(s) of the technician(s) that would be assigned to care for your environment. Check their references and, if an IT vendor has posted a customer testimonial to their web site, give that customer a call and get more information. You might learn that things have changed and they aren't as happy since the testimonial was given, or that while the support is good, their business and computer systems are Macs and you need a PC guru. Hopefully you will find that they have nothing but praise and continue recommending you to anyone and everyone. It's worth the phone call. In addition to checking basic references, here are more areas to investigate to ensure their competency:

Are They Competent to Handle What You Have?

Ask them demonstrate that they are competent in the software and hardware your business uses.

I really like my mechanic, Mike. He does a great job on my family's domestic vehicles but if one day I experience a mid-life crisis

and go nuts with a German sports car. Hopefully Mike can service it, but if not, I'll ask him for a recommendation of someone that can. Imagine if you finally settled on a company you like, but when the tech shows up, he stares blankly at your PC and says, "I'm really more of a Mac guy." That in mind, before you start calling around to see which company gives you the warm and fuzzies, make a list of the software and equipment you expect them to support and go over it with them during the interview. Ask them for specific examples of when and how they have improved networks like yours. Their response should give you an idea of their level of competence with your computer, server, email, financial or accounting platforms.

Familiarity with Your Industry

If you have highly specialized systems, look for companies who cater to your niche.

To a certain extent, the nature of a particular business is incidental to what IT folks do. The accounting staffing company is probably running what the insurance guy has down the hall: HP or Dell hardware running Microsoft Windows, Microsoft Office, QuickBooks, etc. with a T1, DSL or cable modem to the Internet. The staffing company will be running a recruiter-specific software application, such as ProSearch while the Insurance guy's primary production application is Goldmine, or a web-based solution like Salesforce.com. Any IT guy worth his salt can take a quick look at these, do a little reading and have enough information to keep them running reliably. Businesses such as retailers or legal offices might have custom or legacy (old and out of warranty) software that requires a greater understanding to maintain. It can break in so many different ways that only someone with significant experience with that particular product or its foundations can render a fast, effective fix in the event of a failure. With a proper budget and knowledge, the best techs will have it configured with redundancy and failover

mechanisms so that when it does break, it is transparent to the end users and there is no loss of productivity.

If you are running shrink-wrapped software like Windows, Office and QuickBooks, it won't matter as much if the new IT support vendor is not immediately familiar with your marketing business as long as he has experience with the software you run it on. (He should take an interest to understand your business, which I get into in the next section.) If you are a securities broker with an SDLC card for your DTCC solution, it would be helpful to hire someone with a client base similar to your line of work. When that particular line of communication to the Wall Street goes down the last thing you want is your IT guy scratching his head and searching Google for error codes.

Understanding of Your Needs

Getting immediate problems fixed is important, so too is an understanding of what is essential to you and making continued improvements in your network to benefit your business.

As you entertain different companies the better prospects will work to gain an understanding of what is important to you and what you need so that you get a return on the investment you've made in your computer systems. He should ask questions like "What is the biggest challenge you are facing with your computers?", "How do you feel things could be more efficient?" And "How is your current IT support vendor falling short?"

Does she listen and repeat back what you said to demonstrate an understanding of your situation, or just go on and on pushing her own product? Once you finally settle on

hiring someone, over time the consultant should get a feel for your work flow and begin to make suggestions to improve efficiency and reliability. Security vulnerabilities should be discovered and mitigated, ongoing problems identified and resolved and eventually you will notice your network running more smoothly than ever.

A couple of years ago I walked into the office of a new client and could not believe what I found. This was a multi-million dollar retail operation with over 100 employees in the field and 10 people in the corporate office on a peer-to-peer network. The "server" was the office manager's desktop hosting all of the company's documents including HR files, marketing, billing, invoices, resumes, etc. It was also hosting a huge QuickBooks file (over 500 MB!) which the other desktop computers accessed. QuickBooks just isn't designed to run this way and, as a result, it crashed regularly. But that was not the first thing I noticed when I walked in. What caught my eye was a stack of black accounting ledger books, one for each of the 12 stores the company owned and operated. At the end of each shift, staff would call into a special voicemail-only number and leave the sales numbers. The following morning, a clerk would play back as many as 90 voicemails and transcribe the numbers into the black books for the owner to peruse later in the day. Talk about inefficient.

Within a month we had an online form available to the salons via Microsoft's SharePoint. At the end of the shift, they simply added the numbers into the form for the owner's immediate review in Excel. The new procedure saved the company 15 hours per week in labor costs!

Your IT consultant should be looking for ways to save you time and money by recommending and implemented efficiencies like we did for the customer described above. If this has not been your experience with your current provider, you need a new one.

Ensuring Business Continuity

Sure you have backups of your data, but do you know how to restore it? How long can you afford to be down while you struggle to get back up?

In the earliest stages of getting to know your environment, like before they are even hired, support providers should ask about your backups. How are they done – tape, external hard drives, online? Who is responsible for them? Are they tested? Once it is established that backups are performed regularly, and the budget allows, you should have a discussion about *business continuity*. How current does your backup data have to be for you to properly serve your customers? How long can you afford to be down while data is being recovered? In the event of a fire, flood or theft of your computers, how will you get that backed up data onto computers and get your business back up and running?

Make sure that your new IT consultant understands the answers to these questions and has the expertise to properly respond to an emergency to either keep you running, or get you back up and running according to their service level agreement.

Scalability

If you expect to grow, your IT provider should have the knowledge and resources to build a computer infrastructure that grows right along with you.

What are the current growth projections for your company? Are you planning to

downsize, stay as you are, or become the 800 pound gorilla in your market? Of course, a new IT consultant won't be as excited to help you downsize as it implies shrinking income for them as your need for them shrinks right along with you. But if you plan to stay as you are or grow, your service provider should be able to assist as well as keep up. In the economic downturn of late 2000/early 2001, or the "dot-bomb" era, I was laid off as business took a dive and my employer went into survival mode. Seemingly overnight this successful organization went from about 75 employees to about 5. I was retained to support their computers, but when they decided to move to a more austere office I was not consulted and certain critical things were left out of planning the relocation, like the Internet connection. As a staffing organization the Internet was a key tool to find candidates for their customers, to send and receive emails, post positions to the job board on their internally hosted web site and more. No one at the company transferred the existing Internet service to the new office. And even if they had, no one had the expertise to make sure the web site and email would continue to flow when the servers were moved and brought back online. They were dead in the water.

Today you can get an Internet connection in a couple of days, but this incident was back when the DSL providers had over sold their services through very creative TV advertising campaigns (who remembers SBC's "Web Hog" commercials?) and new installations were 6 weeks out. So, in a major pinch, they called me and I was able to help them get a temporary and very slow dial-up connection to the Internet to at least get email flowing again. Whether you are growing or shrinking, your IT guy must know how to set up a new office or move your existing one so that all of your IT services go right along with you. Many IT departments become the de facto Facilities Department of their organizations, so they might even be able to help ensure that your other utilities, such as power and telephone are properly set up as well. If this is an

additional office, it must be determined in advance the level of communication required between the computer systems. Will staff at the new location require access to files on servers at the old location? How will they log onto the network at location 2 when the server is at location 1? Is a new server required or will a site-to-site VPN connection be adequate? These are all issues a good IT service provider should be conscience of and develop solutions for.

Respected in the IT Community

The Mr. Magoo's of the world develop reputations that begin to precede them. I've received resumes from people I would not ever hire based on personal experiences. In some cases the resumes themselves were so error laden, I could not let the sender near one of my computers. On the other hand, some IT guys are so respected that they are never out of a job because they have built such strong reputations as being technically proficient as well as just pleasant to have around. IT vendors can develop similar reputations through the good work of the people that comprise their staff. As mentioned earlier, you should be able to get references from those companies you are hiring, as well as copies of the resumes of the technicians assigned to care for your computers.

Another way to ensure their respectability is through their contributions to the IT community. I have yet to meet the computer professional that knows everything there is to know about computers. There are those who have an awesome memory and can remember every detail of configurations of esoteric applications they worked with 5 years earlier. Others, know a lot, but depend

upon the IT community such as their partnerships and online support forums for help with more difficult issues. Hopefully someone has experienced with the same problem I have and has taken the time to post the resolution online. Likewise, when I get over a hump others are still struggling to conquer, I try and let everyone know the solution that worked for me.

A simple Google or Bing search of the name of the company you're considering, the owner or her technicians might return contributions they have made to their community in the way of technical articles or blog posts. You might also find that they belong to industry affiliations for improving the level of service they provide their customers, awards, or other honors.

Howdy Pard'ner

The vendor you choose should have formal partnerships with the makers of products they sell and support.

Among the myriad reasons Microsoft is such a big and powerful company is the value they place in their partners. As a technician, I know that, if I get in a jam, highly skilled support for any Microsoft product is a phone call away. For each product Microsoft has a team of professionals all over the world to help resolve the situation and make sure my customer is pleased. Whether 2 in the afternoon or 2 in the morning, if my customer's email server is down and I have exhausted all other methods to resolve the problem, I know I can call Microsoft and a team of engineers will work with me 24 hours a day until it is fixed. They are one of the few companies that will do this and it is thanks to my partnership level with them, Small Business Specialist. This is not a designation that comes easy – a prospective partner must pass a series of tests and satisfy other stringent requirements. The more requirements met, the higher the partnership level and associated benefits.

If you are running Microsoft products in your business, make sure that the people you hire to support you enjoy some level of Microsoft partnership. Likewise for Sun Micro Systems, Oracle, Trend Micro, etc. You will benefit greatly from their association with these companies.

They will know more about the product and take greater interest in it resulting in a residual benefit for you in the way of more reliable performance. It could also mean better pricing when it comes time to upgrade or renew your license.

Contracts: Good and Bad

I am so thankful that cable TV, regular telephone service, the gas and power companies don't make you sign a contract. Of course, they are pretty much monopolies so why would they? But I am sure they would if they could – they'd ding you when you move and need to cancel your contract, then they'd nail the person who buys your home with a sign-up fee. Fortunately, they don't do that, at least not the ones in my neck of the woods, at least, not yet. It seems like there is plenty of cellular competition out there, but an implied conspiracy suggest they are in cahoots with their obscene early termination fess in excess of \$300. The upside to the competition is, of course, they know that when that contract is up, you are a free agent to sigh with whomever you please, so they better be Johnny On the Spot when problems need correcting. I notice a significant difference between the level of service I get from the cable carrier which also provides my Internet service for my business (no contract and no cable competition) and my cellular carrier (contract with competition). The service I

get from the latter is infinitely better and I gladly recommend them to others. The cable company? Not so much.

IT support providers have plenty of competition and in order to keep you, most will try and get you into a contract. But that is not necessarily a bad thing. The vendor enjoys predictable cash flow and some assurance that, despite how happy you made them today, they are less likely to hire someone else who is running an enticing promotion. What's more, the vendor wants to keep making you happy by exceeding your expectations. The more smoothly your machines run, the less downtime you have, the less time you have to worry and the more time you have to focus on developing your business.

Likewise, the better your equipment runs, the more money they make not having to pay someone to dash out and fix them. It is win-win for everyone involved. Indeed, contracts in this case can be good for everyone, but make sure that there is some kind of out clause so that you are not held hostage by a company providing you rotten service.

So, if either party can get out at any time, what's the purpose of the contract? To establish expectations: I will perform this service for you and you shall compensate me x. If I fail to perform said service you may cancel the contract. If you fail to pay me, I will stop service until I receive payment, etc.

As I mentioned earlier, I am writing this in a period of economic decline and things are tough all over. I have allowed several clients to defer payment because I know business is slow for them and they are waiting on payment from their clients as well. Historically they pay their bills and we are all counting on the economy improving. But more importantly, their success is my success and their computers not working properly will impair their ability to conduct business and *pay me*. I believe this personal touch is what is going to help many companies survive this tough economy.

Even if your contract establishes 15, 30 or 90 terms, the personal relationship you develop with your

vendor should allow for some wiggle room in this area as circumstances dictate.

NDAs, SLAs and SOWs

When you trust someone with the keys to your kingdom, get some assurance they won't make copies to share with others.

Almost any business has a valuable database of customer contacts that has grown with them over the years. It can include current and past customers as well as sales leads that will hopefully pan out one day. It takes years of hard work to develop such a list which contributes to the overall value of our company. You would never want to lose this resource or allow it to make its way to a competitor. To prevent it from becoming lost or corrupted it should be backed up nightly with your other data. And to keep it from falling into enemy hands, anyone like an IT provider with access should sign a non-disclosure agreement (NDA). This goes for your employees as well; particularly those in a sales role who would benefit from your hard earned Rolodex if they jumped ship to start their own firm or went to work for your rival. You can easily find customizable boiler plate NDAs on-line, or send me an email and I will gladly provide one to you.

SLA and SOWs

Establish in writing expectations for ongoing support as well as any special projects.

As its name implies, the Service Level Agreement (SLA) establishes the level of service the vendor is expected to provide and the customer expects to receive. It can be issued and signed separately or as part of the contract. On the hardware side this might include computers, servers, software, network and ancillary equipment. For

example, the software could include the operating system and production applications such as the Exchange (email server) on the server side and Outlook (email client) on the desktop side. The SLA should also establish how quickly you should expect the vendor to respond to when you alert them to a problem. Depending upon the severity level, their response time might range from 1 hour for the most critical issues (server down) to 4 hours (1 of 5 printers has a paper jam).

Any work not defined in the contract's SLA performed on your computer systems should be clearly defined in a Statement of Work (SOW) to establish expectations on both ends. In a nutshell, the SOW will state the problem or need, the solution, timeline, deliverables, end result and costs.

An SOW might not be needed for the odd printer jam or email snag, but if you have been sold a firewall to control employee web surfing, viruses and spam, the statement of work will help both parties understand the scope of the project and agree when the project has been completed properly by the consultant and accepted by you. The last thing you want is for the consultant to tell you he is finished installing Internet filter but your employees are still updating Facebook on company time and you've got more spam in your Inbox than ever before.

Summary

The sole focus of this article has been to give you some guidelines for selecting a computer consulting company that, in the end, keeps you and your computers humming a happy tune. With any kind of sophisticated there will always be some issues, especially as changes are made, but overall your systems should run reliably when properly cared for and there should be no nagging, lingering problems that never seem to get fixed. I have worked in few companies where IT was given top priority. In fact, I

can count them on one hand; it was a technology company with a commercial website, so naturally there was a great deal of emphasis on the quality of the network, servers, workstations, etc. and technicians looking after them. Unfortunately, either through budget constraints or misplaced priorities, IT usually goes under nurtured and, when there is a failure, it is a big emergency. The email server crashes and everyone runs around like the clichéd headless chicken clamoring for a fix. All the while untold business is lost by this huge workplace distraction. Productivity drops as the crisis dominates the day which is consumed by meetings to find solutions, workarounds or just commiserating and no one able to do his or her job. Making things worse, excuses are having to be given to customers because “the system’s down again” and the organization looks just plain bad.

This example can be applied to printer issues, lost or corrupted data broken or stolen equipment, etc.

The money lost trying to recover will be much more than if basic precautions were taken and regular maintenance were performed by professionals who know what they are doing. The best analogy is your car: If you never changed the oil and other fluids, how long could you expect the vehicle to run reliably? If you have ever changed your own oil you know how gunked up it can get and how you love to pour in that clear honey colored 30-weight. Unless you’re a hard core automotive do-it-yourselfer, your skilled, trained mechanic with years of experience can alert you to minor issues that can become major ones like worn belts or cracked hoses. Better to get these things fixed now than on the way to work or vacation.

Your computers get clogged the same way as an automobile as software is installed and removed or Internet cache files build up. Without maintenance looming hardware failures go undetected until it’s too late. Just like your car, it’s better to spot and fix these things before that big meeting when a hard drive crash could cause the loss of critical data. Only a computer professional with training and experience in the software and hardware you operate has the skill set required keep it all running properly.

Ten Easy Questions

If you have not had the time to read everything in this article, here are a few quick questions to keep in mind when considering a company or individual to care for your business computers:

1. Can you provide a list of customer references?
2. Are you certified to support my hardware and software?
3. Do you have a written Service Level Agreement?
4. Do you have any other customers in my industry? *(If so, make sure they are in the list of references.)*
5. Is your work 100% guaranteed?
6. Do you offer monthly support maintenance agreements?
7. Do you offer a discounted hourly rate for customers under a maintenance agreement?
8. What is your guaranteed call back time for emergencies?

9. How do you protect my data and can you give an example of how you recovered a client's data in the past?
10. How quickly can you get my business systems up and running in the event of an emergency?

About the Author



Charlie O'Hearn is an IT professional holding a Bachelor of Arts Degree from San Jose State University and is a Microsoft Certified Systems Engineer (MCSE). His 15 years of experience ranges from small organizations as a one-man IT department to leading large teams of computer professionals in building and maintaining environments that serve thousands of concurrent end users. Today he owns Plexus IT, a Microsoft-certified Small Business Specialist company, providing computer services to small and medium-sized companies across Los Angeles.