Andy Espo

Andy transitioned out of the events and entertainment business and started Call Andy! Macintosh Consulting in 1998. Since then, Call Andy! has grown to 4 full-time engineers working in virtually all markets that use Macs and iOS devices including small business and high-end residential clients in the Greater Boston area. Andy served on the ACN Advisory Council, and has been a MacTech Session Co-Chair for the past 5 years.



MACTECH PRO EVENTS

Call Andy!

Managing Your Clients To Increase Productivity and to Optimize Revenue

MACTECH PRO EVENTS

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Organize it
Secure it
Document it

Bill it

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Managing Your Clients

- Managing clients IS managing your income.
- Clear communication - from sale to performance to invoice.
- Every invoice tells a story.
- Documentation takes time.
- Documentation doesn't cost money… It makes money.
- There are lots of tools - find the ones that work for you.

Things You Should Know About You

- What's my service area?
- What size client do I work with?
- What are my rates?
- What are my hours of availability?
- What technologies do I support?
- What kind of work do I want to do?

Filter Like Hell

Send the wrong clients to someone else.

The Basics

- Email
- Client Tracking/CRM
- Calendar
- Ticket Tracking
- Time Tracking
- Configuration Tracking
- Billing
- Bookkeeping

Email

- Must to be using your own domain
- Must be synced

Tools

- Apple Mail or Outlook
- Hosted Kerio
- Google Apps for Work
- Hosted Exchange
- Office 365

Client Tracking/CRM

- Who are they?
- Keep complete and accurate contacts
- Track where they came from

Tools

- Daylite
- Contacts
- Busy Contacts
- Outlook

Calendar

- When and where are you working?
- Avoid schedule conflicts
- Visual history of work

Tools

- Daylite
- Calendar
- BusyCal
- Outlook

Ticket Tracking

- Keeps your work organized
- Allows you to see the priorities
- Work doesn't get lost

Tools

- Zendesk
- Autotask
- Web Help Desk

Time Tracking

- Be accurate!
- Document the work you do
- Keep internal notes where necessary

Tools

- FreshBooks
- Billings Pro

Configuration Management

- Client configurations
  - Passwords
  - Apple IDs
  - Machines
  - Network configurations
    - Machine serial numbers
    - Software licenses

Tools

- 1Password
- Encrypted text files
- MonkeyBox

Configuration Management

"My worst enemy is myself 6 months ago" *Phil Goodman, ACN*

Billing

- Never fun, but it's necessary
- Bill no later than end of the month
- Are you billing your clients regularly? It's hard to collect if you haven't invoiced
- How are you tracking payments/receivables?

Tools

- FreshBooks
- Billings Pro
  - Integrates with Daylite
  - QuickBooks Online
  - Xero

Bookkeeping

- If you're good at it?
  - Do it yourself
- If you're not good at it?
  - Hire a bookkeeper

Either way, you need to be *set-up* by a pro!

Tools

- QuickBooks Online/On-Premises
- Xero
- MYOB/AccountEdge

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Ways to generate revenue

- Active system monitoring
  - Like Watchman Monitoring
- Affiliate programs and other service partners
- Affiliate programs for software and products
- Security services such as spam filtering
- Software that you like, and recommend
- Upgrades to existing hardware to extend
- Apple Consultants Network: Business Affiliates program

Notes on Tools

- There are lots of tools - find the ones that work for you.
- Avoid “do it yourself” solutions
  - Supported options are much better
- Adopt the “big boy” tools when you’re ready
  - ConnectWise, etc
- Put everything in!
- Encrypt client data!

Organize it
Schedule it
Secure it
Document it
Bill it

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Do it right the first time

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Enjoy it!

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More Resources

- www.agilebits.com
- www.busymac.com
- www.freshbooks.com
- www.marketcircle.com
- www.zendesk.com
- www.webhelpdesk.com
- www.autotask.com
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- www.getsyncd.com

Questions?



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