



MSP University Helps MSPs Succeed... Period.

I.T. Solutions and Managed Services Sales & Marketing and Service Delivery Boot Camp Agenda

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- › I.T. Solutions and Managed Services Sales & Marketing Track
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* must read

Business Owners

Day One - [click for detailed agenda](#)

- › Introduction and overview of the conference
- › DISC, PTSI and SSI Behavioral Profiles for hiring right the first time
- › Hiring sales and technical staff for managed services sales and delivery success
- › Identifying critical roles and creating win-win compensation plans
- › Lunch and gold sponsor presentations
- › I.T. Sales Engineering and Project Management Best Practices
- › Running your IT Service delivery business by the numbers
- › Platinum Sponsor Presentation I
- › Platinum Sponsor Presentation II
- › Homework for Day One

Business Owners, Sales & Account Managers

Day Two - [click for detailed agenda](#)

- › MSP Core Concepts – Client solution roadmap and profitability matrix
- › From marketing to agreement – The 51-step I.T. sales & marketing process
- › Creating your inside marketing plan for success
- › Two of the most important stages of the sales process – warm up and qualifying
- › The managed services sales process – warm up and qualifying roleplay
- › Lunch and gold sponsor presentations
- › Selling a managed services agreement – 1st appointment overview
- › Selling a managed services agreement – 1st appointment role-play
- › Platinum Sponsor Presentation I
- › Platinum Sponsor Presentation II
- › Homework for Day Two



Business Owners, Sales & Account Managers (cont...)

Day Three - [click for detailed agenda](#)

- › Successful IT Solutions and managed services marketing strategies
- › Creating effective infrastructure upgrades and managed services proposals
- › Showing value through the managed services client powerpoint presentation
- › Selling a managed services agreement – client powerpoint presentation role-play
- › Using the managed services pricing/ROI calculator for maximum value and profit
- › Lunch and gold sponsor presentations
- › Selling a managed services agreement – presenting the agreement and proposal
- › Presenting the agreement and proposal role-play
- › Maximizing business growth and profitability with MSP university
- › Wrap-up, town hall meeting and closing Q&A
- › Homework for Day Three

Business Owners, Service Managers & Technical Staff

Day Two - [click for detailed agenda](#)

- › Microsoft Windows Server 2008/SBS 2008/EBS 2008 Drill-down
- › Service dispatch best practices
- › Problem management best practices
- › Lunch and gold sponsor presentations
- › Service desk best practices
- › NOC operations best practices
- › Platinum Sponsor Presentation I
- › Platinum Sponsor Presentation II
- › Homework for Day Two



Business Owners, Service Managers & Technical Staff (cont...)

Day Three - [click for detailed agenda](#)

- › Best practices for sales engineering
- › Best practices for project management
- › Best practices for onsite service delivery
- › Best practices for service management profitability
- › Lunch and gold sponsor presentations
- › Best practices for hosting and virtualization services
- › Best practices for partnering with and managing vendors and fulfillment partners
- › Maximizing business growth and profitability with MSP university
- › Wrap-up, town hall meeting and closing Q&A



General Information

Attendee Requirements

All attendees are required to:

1. Be on time for each session
2. Complete nightly homework assignments
3. Participate in role-play sessions as required

Hotel

Hyatt Regency Baltimore
300 Light Street
Baltimore, MD 21202

Phone: (410) 528-1234

Fax: (410) 685-3362

Page Legend

- All Business Owners/General Information
- Sales & Marketing Track
- Technical Service Delivery Track

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Quick Schedule Day One

Thursday, May 21st, 2009

8:00am - 5:00pm	Registration
8:00am - 9:00am	Opening Ceremonies Welcome Address and MSP University Introductions
9:00am - 9:45am	DISC, PTSI and SSI Behavioral Profiles for Hiring Right the First Time
9:45am - 10:00am	Morning Break
10:00am - 10:45am	Hiring Sales and Technical Staff for Managed Services Sales and Delivery Success
10:45am - 11:45am	Identifying Critical Staff Roles and Creating Win-Win Compensation Plans
11:45am - 1:15pm	Lunch Break and Gold Sponsor Presentations
1:15pm - 2:00pm	I.T. Sales Engineering and Project Management Best Practices
2:00pm - 3:00pm	KPI's - Running Your I.T. Service Delivery Business by the Numbers
3:00pm - 3:15pm	Afternoon Break
3:15pm - 4:00pm	Platinum Sponsor Presentation
4:00pm - 4:45pm	Platinum Sponsor Presentation
4:45pm - 5:00pm	Day One Wrap-Up and Homework Assignments
5:00pm - 7:00pm	Board Rooms

- Business Owners/All Track - Training
- Breaks - Common Areas/Sponsors Area



Quick Schedule Day Two

Friday, May 22nd, 2009

7:00am - 4:00pm	Registration	
7:00am - 8:00am	MSP Core Concepts - Client Solution Roadmap and Profitability Matrix	
8:00am - 9:00am	From Marketing to Agreement - The 51-Step Sales & Marketing Process	Microsoft Windows Server 2008/ SBS 2008/EBS 2008 Drill-Down
9:00am - 10:00am	Creating Your Inside Marketing Plan for Success	
10:00am - 10:15am	Morning Break	
10:15am - 11:15am	Warm-Up and Qualifying	Service Dispatch Best Practices
11:15am - 12:15pm	Warm-Up and Qualifying Role-Play	Problem Management Best Practices
12:15pm - 1:45pm	Lunch Break and Gold Sponsor Presentations	
1:45pm - 2:45pm	Selling Managed Services - 1st Appointment Overview	Service Desk Best Practices
2:45pm - 3:45pm	Selling Managed Services - 1st Appointment Role-Play	NOC Operations Best Practices
3:45pm - 4:00pm	Afternoon Break	
4:00pm - 4:45pm	Platinum Sponsor Presentation	
4:45pm - 5:30pm	Platinum Sponsor Presentation	
5:30pm - 5:45pm	Day Two Wrap-Up and Homework Assignments	
6:00pm - 8:00pm	Board Rooms	

- Business Owners/All Track - Training
- Sales & Marketing Track - Training and Role Play
- Technical Service Delivery Track - Training
- Breaks - Common Areas/Sponsors Area



Quick Schedule Day Three

Saturday, May 23rd, 2009

7:00am - 8:00am	Successful I.T. Solutions and Managed Services Marketing Strategies	
8:00am - 9:00am	Creating Effective Infrastructure Upgrades and Managed Services Proposals	
9:00am - 10:00am	Showing Value Through the Managed Services Client PowerPoint Presentation	Best Practices for Sales Engineering and Project Management
10:00am - 10:15am	Morning Break	
10:15am - 11:15am	Selling a Managed Services Agreement - Client PowerPoint Presentation Role-Play	Best Practices for Onsite Service Delivery
11:15am - 12:15pm	Using the Managed Services Pricing/ROI Calculator for Maximum Value and Profit	Best Practices for Service Management Profitability
12:15pm - 1:45pm	Lunch Break and Gold Sponsor Presentations	
1:45pm - 2:45pm	Selling a Managed Services Agreement - Presenting the Agreement and Proposal	Best Practices for Hosting and Virtualization Services
2:45pm - 3:45pm	Presenting the Agreement and Proposal Role-Play	Best Practices for Partnering With and Managing Vendors and Fulfillment Partners
3:45pm - 4:00pm	Break	
4:00pm - 4:30pm	Maximizing Business Growth and Profitability with MSP University	
4:30pm - 5:00pm	Wrap-Up and Closing Q&A	

- Business Owners/All Track - Training
- Sales & Marketing Track - Training and Role Play
- Technical Service Delivery Track - Training
- Breaks - Common Areas/Sponsors Area



8:00am - 9:00am

Introduction and Overview of Conference

Gary Beechum, President and CEO, and Erick Simpson, Vice President and CIO of MSP University kick off this intense 3-day event with introductions of key MSP University staff, our business partners supporting the event and a breakdown of what will be covered over the next 3 days along with nightly attendee homework and expectations.

During this session, the required reading for “The Guide to a Successful Managed Services Practice, The Best I.T. Sales and Marketing BOOK EVER!,” and “The Best I.T. Service Delivery BOOK EVER!” will be discussed, and average test scores will be shared, along with a discussion of the Sales Strategy Index, the Personal Talent Skills Inventory and the average profile scores attained by the attendees as a group.

Content to include:

What will be covered over the next 3 days
 MSP University Member Expectations
 MSP University Expectations of Members
 Staff Introductions
 Business Partner Introductions
 MSP University Instructional Teams

MSP University Instructors:

Gary Beechum, President and CEO
 Erick Simpson, Vice President and CIO

MSP University Staff:

Rafael Sanguily, Director of Business Development
 Kate Hunt, Partner Support Manager
 Jamie Williams, Partner Support Manager
 Jasmine Cano, Partner Support Specialist
 Danielle Fraley, Project Manager
 Han Nguyen, Project Coordinator
 Dwight Blair, Graphic Designer
 Giovanni Sanguilly, Director of Sales
 Cesar Ordaz, Sales Support Manager
 Quinn Nguyen, Sales Support Specialist
 Valerie Cano, Executive Assistant

9:00am - 9:45am

DISC, PTSI and SSI Behavioral Profiles for Hiring Right the First Time

This session focuses on using DISC, PTSI and SSI profiles to successfully hire I.T. and Managed Services administrative, technical and sales staff to sell, deliver and maintain Managed Services efficiently and profitably. Team-building as an organization will also be covered, as well as how to offer DISC solutions to your clients as their Trusted Advisor and earn additional annuity-based revenue.



MSP University tools used during this session:

- 👉 PeopleKeys: Understanding Personality Styles handbook
- 👉 **MSP University Instructor:** Erick Simpson

10:00am - 10:45am

Hiring Sales and Technical Staff for Managed Services Sales and Delivery Success

This session focuses on successful hiring and on-boarding techniques for sales and technical staff to close and deliver Managed Services efficiently and profitably. Topics include effective employment ad creation, resume review, the interview process, offer letters, employment agreements and training and management considerations.

MSP University tools used during this session:

- 👉 MSP University HR toolkit
- 👉 **MSP University Instructor:** Erick Simpson

10:45am - 11:45am

Identifying Critical Staff Roles and Creating Win-Win Compensation Plans

This session focuses on identifying which roles you need to fill today for success, and the new ones required as you grow your service business, and help you determine who to hire first, second and beyond. Topics include developing effective compensation strategies for sales and technical staff that rewards execution and goal attainment, improving staff morale, loyalty and customer satisfaction - resulting in increased business profitability.

MSP University tools used during this session:

- 👉 MSP University HR Toolkit
- 👉 **MSP University Instructor:** Erick Simpson

11:45am - 1:15pm

Lunch and Gold Sponsor Presentations

Lunch will include two Gold Sponsor Presentations

1:15pm - 2:00pm

I.T. Sales Engineering and Project Management Best Practices

This 2-topic double session focuses on revealing the importance of the Sales Engineer in the pre and post-sales process, along with best practices for sales engineering to minimize costly mistakes and improve overall profitability, and effective IT Solution and Infrastructure Upgrade proposal creation. The second topic covered is the natural follow-on to sales and sales engineering: project management, where the lifecycle of a successfully managed project will be illustrated from proper planning all the way through implementation.



Sales Engineer

- › Role during pre and post-sales
- › Value to the organization
- › Sales engineering process
 - » Understanding needs
 - » Evaluating solutions and vendors
 - » Developing quotes and proposals
 - » Assisting in closing opportunities

Project Manager

- › Role during pre and post-sales
- › Value to the organization
- › Project management process
 - » Understanding requirements
 - » Evaluating timelines and schedules
 - » Developing project plans
 - » Managing project implementation

MSP University tools used during this session:

- 🔗 MSP University Best Practices Guide: Effective Sales Engineering
- 🔗 MSP University Best Practices Guide: Effective Project Planning and Implementation
- 🔗 **MSP University Instructor: Erick Simpson**

2:00pm - 3:00pm

KPI's - Running Your I.T. Service Delivery Business by the Numbers

This session will reveal how to determine your total cost of service delivery and desired gross margin for services - the first step in determining profitability. In addition, key performance indicators will be identified and discussed - the keys to growing your I.T. Service Practice. Real-world best-in-class performance data will be shared during this important session.

MSP University tools used during this session:

- 🔗 MSP University IT Performance Forecast
- 🔗 **MSP University Instructor: Erick Simpson**

3:15pm - 4:00pm

Platinum Sponsor Presentation

This session will be devoted to a Platinum Sponsor presentation.

4:00pm - 4:45pm

Platinum Sponsor Presentation

This Session will be devoted to a Platinum Sponsor presentation.

4:45pm

Homework

Attendees will be provided materials and information to complete the following required tasks prior to attending Day two of the boot camp.

[Click here for Day One's homework assignments](#)



7:00am - 8:00am

MSP Core Concepts - Client Solution Roadmap & Profitability Matrix

This session focuses on teaching attendees how to identify and forecast the amount of revenue that can be gained from their existing clients through a systematic process of existing and new solution identification, sale and implementation; and through transitioning them to a Managed Services delivery model. In addition, selling integrated T1's by illustrating cost savings reflected by an ROI analysis of a prospect's existing phone and broadband bills will be covered, providing an example of partnering with an external resource to deliver additional annuity-based solutions to clients as a trusted advisor.

MSP University tools used during this session:

- 🔗 MSP University Client Solution Roadmap
- 🔗 MSP University Managed Services Profitability Matrix
- 🔗 **MSP University Instructor: Erick Simpson**

8:00am - 9:00am

From Marketing to Agreement - The 51 Step Sales & Marketing Process

This session focuses on an in-depth 51-step marketing, sales, and closing process from initial outbound direct mail and telemarketing effort to appointment-setting, network analysis, proposal creation, 3-appointment presentation and close, follow-up, on-boarding and client appreciation. Following this step-by-step process you will close more business and shorten your sales cycles by conducting the sales and marketing process as a true sales professional and trusted advisor.

MSP University tools used during this session:

- 🔗 MSP University 51-Step Sales & Marketing Process
- 🔗 **MSP University Instructor: Gary Beechum**

9:00am - 10:00am

Creating Your Inside Marketing Plan for Success

This session focuses on how to create and correctly utilize an Inside Marketing Plan to manage your marketing campaigns and efforts, track opportunities and ROI and adhere to a structured marketing process to close more business more quickly. An example marketing plan will be utilized to create a sample marketing campaign during this session.

MSP University tools used during this session:

- 🔗 MSP University Inside Marketing Plan
- 🔗 MSP University Marketing Cost/ROI Calculator
- 🔗 **MSP University Instructor: Gary Beechum**



10:15am - 11:15am**Two of the Most Important Stages of the Sales Process - Warm-Up & Qualifying**

This session focuses on two of the most important steps in any sales process - warming up the prospect and properly qualifying them for your products and services. If your prospect is not warmed up properly, you will fail to make the all-too important connection with them, without which you will have difficulty closing them. Without proper qualification, you run the risk of wasting both your and your prospect's valuable time attempting to sell them something they may not be qualified to purchase, creating false expectations and inaccurate sales forecasts. Attendees will learn how to accomplish both of these critical processes successfully during this session, helping to distinguish between unqualified leads and real prospects, and shortening sales cycles through proper warm-up techniques.

👉 **MSP University Instructor: Gary Beechum**

11:15am - 12:15pm**The Managed Services Sales Process - Warm-Up & Qualifying Role-Play**

Attendees are separated into pairs during this warm-up and qualifying role-play session, with teams each role-playing the warm-up and qualification process with each other, as their peers judge them by providing constructive feedback.

👉 **MSP University Instructor: Gary Beechum**

12:15pm - 1:45pm**Lunch and Gold Sponsor Presentations**

Lunch will include two Gold Sponsor Presentations.

1:45pm - 2:45pm**Selling a Managed Services Agreement - 1st Appointment Overview**

This session builds upon the concepts reviewed by attendees during the previous night's homework assignments and provides an overview of the first of three prospect engagements in the Managed Services Agreement sales process and provides an opportunity for Q&A between the attendees and their instructor.

MSP University tools used during this session:

👉 MSP University Needs Analysis Form

👉 **MSP University Instructor: Gary Beechum**



2:45pm - 3:45pm

Selling a Managed Services Agreement - First Appointment Role-Play

Attendees are separated into pairs during this first prospect engagement role-play session, with team each role-playing the first engagement process with each other, as their peers judge them by providing constructive feedback.

👉 **MSP University Instructor: Gary Beechum**

4:00pm - 4:45pm

Platinum Sponsor Presentation

This session will be devoted to a Platinum Sponsor presentation

4:45pm - 5:30pm

Platinum Sponsor Presentation

This session will be devoted to a Platinum Sponsor presentation

5:30pm

Homework

[Click here for day two's homework assignments](#)



7:00am - 8:00am

Successful I.T. Solutions & Managed Services Marketing Strategies

This session will reveal how to create and correctly utilize case studies, white papers, newsletters and news releases to successfully attract your target market. Concepts such as Search Engine Optimization (SEO) for your website to help increase its ranking in search engines will be covered as well. In addition, a little-known direct mail marketing technique that insures your letters get opened and their messages read by the decision-maker and not their gatekeeper will be shared. A tremendously cost-effective method for having postcards and direct-mail pieces printed, addressed, posted and mailed by the US Postal Service for a campaign of any size with just a few mouse clicks will also be discussed, and how it can save hundreds on your marketing costs.

MSP University tools used during this session:

- MSP University Best Practices Guide: Creating a Successful Managed Services Marketing Plan
- MSP University Best Practices Guide: Marketing Managed Services
- **MSP University Instructor: Erick Simpson**

8:00am - 9:00am

Creating Effective Infrastructure Upgrades & Managed Services Proposals

This session builds upon the concepts reviewed by attendees during the previous night's homework assignments and covers the importance of a professionally-prepared proposal in shortening sales cycles for I.T. solutions, infrastructure upgrades and Managed Services proposals. A sample proposal will be utilized to illustrate core components and layout of an effective proposal.

MSP University tools used during this session:

- MSP University Best Practices Guide: Creating an Infrastructure and Managed Services Proposal
- MSP University Sample Infrastructure Proposal
- **MSP University Instructor: Erick Simpson**

9:00am - 10:00am

Showing Value Through the Managed Services Client PowerPoint Presentation

This session builds upon the concepts reviewed by attendees during the previous night's homework assignments and covers proper delivery of the managed services PowerPoint presentation to prospects and clients. Conducted during the second client engagement, a properly-crafted managed services PowerPoint presentation will allow you to remain on point in delivering your value-added message, generate interest and trust in your prospect, and reveal your services as an investment in reducing the prospect's overall costs, increasing efficiencies and productivity and mitigating business pain and risk - equaling increased profitability.



MSP University tools used during this session:

- 🔗 MSP University Managed Services Client PowerPoint Slide Deck
- 🔗 **MSP University Instructor: Gary Beechum**

10:15am - 11:15am

Selling a Managed Services Agreement - Client PowerPoint Presentation Role-Play

Attendees are separated into pairs during this second prospect engagement role-play session, with three teams of two attendees each role-playing the client PowerPoint presentation process with each other, as their peers judge them by providing constructive feedback.

- 🔗 **MSP University Instructor: Gary Beechum**

11:15am - 12:15pm

Using the Managed Services Pricing/ROI Calculator for Maximum Value and Profit

This session builds upon the concepts reviewed by attendees during the previous night's homework assignments and covers the most popular pricing strategies used by MSP's for their managed services deliverables, along with the pros and cons of each pricing model. This discussion highlights the differences between Per Device, Per User, Per Service and Value Pricing, and how each affects profitability, client perception and commoditization. The benefits of Value Pricing in maximizing service profits and promoting the consultative, trusted advisor role critical to developing deep client relationships, along with a demonstration of the proper utilization of the MSP University managed services pricing/ROI calculator are also covered.

MSP University tools used during this session:

- 🔗 MSP University Managed Services Pricing/ROI Calculator
- 🔗 **MSP University Instructor: TBD**

12:15pm - 1:45pm

Lunch and Gold Sponsor Presentations

Lunch will include two Gold Sponsor Presentations.

1:45pm - 2:45pm

Selling a Managed Services Agreement - Presenting the Agreement & Proposal

This session builds upon the concepts reviewed by attendees during the previous night's homework assignments and covers the importance of a professionally-prepared agreement in shortening sales cycles for Managed Services, including specifics on important areas to cover with the prospect, such as what is included and excluded, the term of the Agreement and the prioritization and response and resolution process for effective SLA management. Common objections will also be presented during this session, along with effective ways to overcome them.



MSP University tools used during this session:

- 👉 MSP University Best Practices Guide: Closing the Managed Services Deal in 3 Appointments or Less
- 👉 MSP University Sample Managed Services Agreement
- 👉 **MSP University Instructor: Gary Beechum**

2:45pm - 3:45pm

Presenting the Agreement and Proposal Role-Play

Attendees are separated into pairs during this third prospect engagement role-play session, with three teams of two attendees each role-playing the client Managed Services Agreement and proposal presentation process with each other, as their peers judge them by providing constructive feedback.

- 👉 **MSP University Instructor: Gary Beechum**

4:00pm - 4:30pm

Maximizing Business Growth and Profitability with MSP University

This session covers additional training and resource opportunities available with MSP University; as well as newly-scheduled boot camps, to help grow your revenues by increasing utilization and profitability through effective technical service delivery. In addition, review of attendee CEO task list performance is conducted, as well as announcements of the 2009 roadmap for the MSP University training portal.

MSP University tools used during this session:

- 👉 MSP University Extended Membership Calculator
- 👉 **MSP University Instructor: Gary Beechum**

4:30pm - 5:00pm

Wrap-Up, Town Hall Meeting and Closing Q&A

The boot camp will wrap up with a recap of the prior days' events, assignments of homework for attendees' next CEO Support Call, and close with a town-hall meeting where Q&A will be addressed by attendees as well as MSP University Instructors, Business Partners and Staff.

MSP University Instructors:

Gary Beechum, President and CEO
Erick Simpson, Vice President and CIO

Homework

Attendees will be provided materials and information to complete required tasks prior to their next CEO Support Call.



8:00am - 10:00am**Microsoft Windows Server 2008/SBS 2008/EBS 2008 Drill-Down**

This session focuses on Microsoft's next generation server products, and will drill down into features, benefits, implementation, management and maintenance of Windows Server 2008, Small Business Server 2008 and Essential Business Server 2008...

👉 **Microsoft Instructor: TBD**

10:15am - 11:15am**Service Dispatch Best Practices**

This session focuses on one of the most critical activities for service delivery profitability - the dispatch function. Proper management and scheduling of billable resources will increase utilization, profitability and client satisfaction. Attendees will learn best practices for proactive remote maintenance support, reactive and scheduled onsite services, dispatch management of technical resources, and effective communication techniques between all affected parties to maintain SLAs and client satisfaction.

👉 **MSP University Instructor: Erick Simpson**

11:15am - 12:15pm**Problem Management Best Practices**

This session focuses on successful problem management, escalation and remediation best practices, with a step-by-step problem identification, documentation, assignment, escalation, and communication and remediation process for effective, efficient service delivery.

MSP University tools used during this session:

👉 MSP University Problem Management Process

👉 **MSP University Instructor: Erick Simpson**

12:15pm - 1:45pm**Lunch and Gold Sponsor Presentations**

Lunch will include two Gold Sponsor Presentations.

1:45pm - 2:45pm**Service Desk Best Practices**

This session focuses on the function of the service desk and its role in the service delivery process. Topics include effective service desk design, tools and technology requirements, roles and responsibilities of service desk staff, service desk day-to-day procedures, telephone and email communications standards, SLA guidelines and client on-boarding best practices.



MSP University tools used during this session:

- 🔗 MSP University Best Practices Guide: Effective Service Desk Operations
- 🔗 **MSP University Instructor: Erick Simpson**

2:45pm - 3:45pm

NOC Operations Best Practices

This session focuses on the function of the NOC and its role in the service delivery process. Topics include effective NOC design, tools and technology requirements, roles and responsibilities of NOC staff, NOC staff day-to-day procedures, telephone and email communication standards, SLA guidelines and client on-boarding best practices.

MSP University tools used during this session:

- 🔗 MSP University Best Practices Guide: Effective NOC Operations
- 🔗 **MSP University Instructor: Erick Simpson**

3:45pm - 4:30pm

Platinum Sponsor Presentation

This session will be devoted to a Platinum Sponsor Presentation.

4:30pm - 5:15pm

Platinum Sponsor Presentation

This session will be devoted to a Platinum Sponsor Presentation.

5:15pm

Homework

[Click here for day two's homework assignments](#)



8:00am - 9:00am

Best Practices for Sales Engineering

This session focuses on revealing the importance of the Sales Engineer in the pre and post sales process along with best practices for sales engineering to minimize costly mistakes and improve overall profitability, and effective I.T. solution and infrastructure upgrade proposal creation.

Sales Engineer

- › Role during pre and post-sales
- › Value to the organization
- › Sales engineering process
 - » Understanding needs
 - » Evaluating solutions and vendors
 - » Developing quotes and proposals
 - » Assisting in closing opportunities

MSP University tools used during this session:

- 🔗 MSP University Best Practices Guide: Effective Sales Engineering
- 🔗 **MSP University Instructor: Erick Simpson**

9:00am - 10:00am

Best Practices for Project Management

This session focuses on revealing the importance of the Project Manager in the pre and post-sales process, along with best practices for project managing to minimize costly mistakes and improve overall profitability, and effective I.T. solution and infrastructure upgrade proposal creation.

Project Manager

- › Role during pre and post-sales
- › Value to the organization
- › Project management process
 - » Understanding requirements
 - » Evaluating timelines and schedules
 - » Developing project plans
 - » Managing project implementation

MSP University tools used during this session:

- 🔗 MSP University Best Practices Guide: Effective Project Planning and Implementation
- 🔗 **MSP University Instructor: Erick Simpson**



10:15am - 11:15am

Best Practices for Onsite Service Delivery

This session will focus on methods to deliver the best onsite service delivery experience for your clients, their end-users and your technical staff to increase client satisfaction and build continued loyalty among your clients. Topics include preparation prior to the visit, what to do first after arriving onsite, communication and customer service tips to identify needs while keeping clients at ease and cooperative, setting the proper expectations, what NOT to say, what to do when things go wrong, and when to escalate to the service manager. Additional topics include how to listen for and position up-sell opportunities correctly to ease the sales process and managing sub-contractors to service your clients effectively.

👉 **MSP University Instructor: Erick Simpson**

11:15am - 12:15pm

Best Practices for Service Management Profitability

This session will concentrate on overall service management - what systems to implement to measure and manage key performance indicators such as utilization, realization, SLA performance, escalation, client satisfaction, staff morale, costs by labor, service and project deliverables, and desired margins. Service delivery reporting and meeting frequency and agendas will also be discussed.

MSP University tools used during this session:

- 👉 MSP University I.T. Performance Forecast
- 👉 MSP University Managed Services Profitability Matrix
- 👉 MSP University Managed Services Pricing/ROI Calculator
- 👉 **MSP University Instructor: Erick Simpson**

12:15pm - 1:45pm

Lunch and Gold Sponsorship Presentations

Lunch will include two Gold Sponsor Presentations.

1:45pm - 2:45pm

Best Practices for Hosting and Virtualization Services

This session covers marketing and selling Hosting and Virtualization services to prospects and clients, and offers practical advice on conducting technical implementations and provides guidance to successfully accelerate your clients' adoption of new and cloud technologies. Topics include translating enterprise concepts into core concepts and helping you understand the potential benefits of developing or partnering to acquire the capability to integrate hosting and virtualization services into your service offerings.

👉 **Instructor: Dave Sobel, CEO, Evolve Technologies**



2:45pm - 3:30pm

Best Practices for Partnering With and Managing Vendors and Fulfillment Partners

There is simply no way for a service organization to directly deliver and manage all of the I.T. solutions, products and services all of their clients need successfully. This session focuses on identifying the most highly-requested solutions and services prospects and clients are asking for, seeking out and selecting vendors and fulfillment partners to help sell, implement and manage these solutions, and tips on managing the entire process from start to finish. Topics include vendor agreements, NDAs and non-competes, maintaining the primary position with the client and the vendor/fulfillment partner, and how to replace a vendor/fulfillment partner mid-stream without negatively affecting your client relationships.

MSP University tools used during this session:

- MSP University Client Solution Roadmap
- **MSP University Instructor: Erick Simpson**

3:45pm - 4:15pm

Maximizing Business Growth and Profitability with MSP University

This session covers additional training and resource opportunities available with MSP University; as well as newly-scheduled boot camps, to help grow your revenues by increasing utilization and profitability through effective technical service delivery. In addition, review of attendee CEO task list performance is conducted, as well as announcements of the 2009 roadmap for the MSP University training portal.

MSP University tools used during this session:

- MSP University Extended Membership Calculator
- **MSP University Instructor: Gary Beechum**

4:15pm - 5:00pm

Wrap-Up, Town Hall Meeting and Closing Q&A

The boot camp will wrap up with a recap of the prior days' events, assignments of homework for attendees' next CEO Support call, and close with a town-hall meeting where Q&A will be addressed by attendees as well as MSP University Instructors, Business Partners and Staff.

MSP University Instructors:

Gary Beechum, President and CEO
Erick Simpson, Vice President and CIO

Homework

Attendees will be provided materials and information to complete required tasks prior to their next CEO Support Call.



Homework

I.T. Solutions and Managed Services Sales & Marketing Track

Day One

- › Watch the Client Needs Analysis Presentation video featuring Gary Beechum
- › Watch the Client PowerPoint Presentation video featuring Gary Beechum
- › Watch the Client Solution Roadmap webcast featuring Erick Simpson
- › Watch the Profitability Matrix webcast featuring Erick Simpson

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Day Two

- › Watch the Client Managed Services Agreement Presentation video featuring Gary Beechum
- › Watch the Infrastructure Upgrade and Managed Services Proposal webcast featuring Erick Simpson
- › Make an audio recording of your Managed Services Pricing/ROI Calculator to a client in OneNote
- › Make an audio recording of your Managed Services PowerPoint presentation to a client in OneNote
- › Watch the Managed Services Cost/ROI Calculator webcast featuring Erick Simpson
- › Modify the MSP University Managed Services PowerPoint deck to support your products and services
- › Watch the Managed Services Agreement webcast featuring Erick Simpson
- › Create a draft of your Inside Marketing Plan

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Homework

Technical Service Delivery Track

Day One

- › Review the MSP University Problem Management Process Drawing
- › Read the MSP University Service Desk Operations Best Practices Guide
- › Read the MSP University NOC Operations Best Practices Guide

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Day Two

- › Modify the MSP University Problem Management Process to adapt it to your organization
- › Read the MSP University Service Desk Operations Best Practices Guide
- › Read the MSP University NOC Operations Best Practices Guide
- › Read the MSP University Sales Engineering Best Practices Guide
- › Read the MSP University Successful Project Planning and Implementation Best Practices Guide
- › Watch the Infrastructure Upgrade and Managed Services Proposal webcast featuring Erick Simpson
- › Watch the Managed Services Cost/ROI Calculator webcast featuring Erick Simpson

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