Six Must-Have's for Successful Services Organizations

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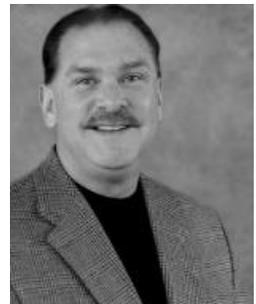
All IT Solution Providers and Value Added Resellers (VARs) are attempting to evolve and grow into providing a greater percentage of their business through professional and consulting services. The reasons for this consistent growth objective are obvious: greater "stickiness" with customers, a tangible way to demonstrate value, higher margins, and technical growth for their engineers. While this desire to grow services among VARs is consistent, the ability to be successful is elusive. The purpose of this paper is to highlight the anatomy of a successful IT Services Practice.

While this paper is not intended to be an exhaustive list of best practices, it does provide the core, albeit a beginning, to a successful services business.

1. **Focus** – *A sure way to fail is to offer a variety of services, or any service, that you can't deliver.*

   Make sure your Services Practice begins with hyper-focus on what you can confidently deliver. One of the most common reasons for failure in a services business is a willingness to say "Yes" when the answer should have been "No." No matter how tempting it is, be willing to say "No" more often than you say "Yes."

   By the way, every potential customer knows that your organization cannot possibly deliver all IT services; so be honest.

2. **Talent** – *Have the technical talent that lines up with your area(s) of service delivery focus.*

   Maybe this is obvious, but finding great **technical talent** cannot be over-emphasized. Technical talent, however, is not all that is needed.

It is highly desirable to hire technical personnel who possess strong **communication skills**, both written and verbal. Communication skills are essential in communicating a solution, explaining technical concepts, and sharing both good and bad news with clients.

Communication skills are needed to provide accurate project status as well as to work as part of a team and partnership with clients.

The final valuable skill is **project management**, or, at a minimum, possessing the key attributes of project management. Engineers with project management skills complete projects on time, understand how to operate against a defined budget, and consistently turn in their time cards and status reports.
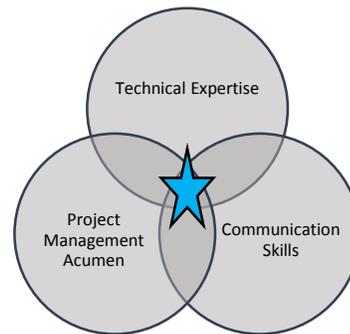
Should you find an engineer with these three key traits (technical expertise, communication skills, and project management acumen), hire them; and pay them whatever they want. These skills can help you build a strong and lasting professional services business.

Moving at the Speed of Trust

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3. **Scope, Details, & Project Planning** –
Understand the details of the project and the expectations of the client.

This should be your first priority when engaging with a client to deliver professional services. The IT services business is fraught with surprises, unforeseen challenges, shifting resources, and wildly changing technologies. Given the volatility the IT services professional operates within, it is essential that care be taken to clearly define all of these:

- ✓ Scope of work
- ✓ Roles and responsibilities
- ✓ Schedule
- ✓ Budget
- ✓ Escalation/communication plans

Too often the client is in a big hurry to get the project started. This leads to key discovery details and expectation setting being pushed to the back burner. It is easy to believe the lie that, "We will figure it out as we go."

While it is essential to jump in quickly and be responsive, it is also essential to establish a clear roadmap of the project and the details surrounding delivery before moving forward with the project. Take the time to do your homework and lay out a well understood Statement of Work (SOW). At the end of the day, both your engineers and the client will appreciate it.

4. **Human Engagement & Partnership** –
Engage and communicate with the client.

Years of experience has empirically shown that engaging and communicating with the client will enhance the likelihood of success. Nearly all IT projects require the client to support the efforts of the Solution Provider. The client is often

needed to provide power for new equipment, access to systems, and specific tasks along the way that only the client's IT personnel can do. Most IT projects are complex, and having all hands on deck in a true team environment is helpful and beneficial to positive outcomes.

> PROBLEMS WILL GET RESOLVED FASTER BECAUSE OF ESTABLISHED RELATIONSHIPS.

Building a true, engaging partnership with your client creates a better opportunity for synergy and teamwork. Begin with a face-to-face project kickoff meeting, followed by consistent phone calls and status reports. Whenever possible, seize the opportunity to meet in person to review project status and progression. Face-to-face engagement is even more important when the project experiences setbacks or problems. In-person meetings should always be scheduled for major milestone reviews and the final project completion. Human engagement and interaction will promote the completion of common objectives, and problems will likely get resolved faster because of the established relationships.

5. **Responsiveness & Clearing the Road** –
Help clients get to your project.

As IT Service Providers, we spend a lot of time waiting for clients to be ready for our services. We consistently hear, "Well, we would get the project started; but we need to do X first." As a result, we wait (and wait and wait). Perhaps the client needs more power in the data center, or maybe they need to finish a different project before they can free up resources to help us on our project. No matter what the reason, IT projects always seem to be waiting on something to get started.

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As IT Service Providers, are we helpless to improve this situation and condemned to a world of waiting and delays? No! Instead, we can actually help our clients through their roadblocks. The solution is to engage with them to clear the clutter on the road of progress.

Why not offer up your own services to help complete the current project? In some cases, the client may be stumbling through another project because they do not have the needed technical expertise. These are perfect situations where we can engage and offer help and support. Stop waiting, and start engaging. This will not fix all of your project delays, but it will surely help in many cases.

6. **Leadership** – *Define, model, and measure consistent practices for your team*.

To build and develop an IT Services Practice requires strong leadership. A leader is required to define, model, and measure consistent behavior and delivery practices of all personnel working within the practice. The IT Services leader must also provide the bridge between an organization's sales personnel and the actual delivery of IT projects. This leader must also engage to deal with programmatic problems and missed expectations. He or she also plays a key role in keeping a pulse on all projects and assessing, on a continuum, how things are going on each.

As many of us have learned firsthand, assuming that everything is going fine is a great way to miss big opportunities to correct problems mid-stream before they become chronic. The service delivery leader also plays a key role in defining a consistent set of expectations for the delivery team, providing clients with a consistent experience and predictable outcomes.

Business Practices for the Delivery of IT Service Projects at Zunesis

1. Face-to-face kick off meeting with the client
   - ✓ This will happen before the project gets started or as the first step in beginning the project.

2. Weekly progress reports for the life of the project
   - ✓ Good News: Weekly accomplishments
   - ✓ Bad News: Anything that went wrong, problems, or challenges
   - ✓ Customer Needs: Are we waiting for the customer to do anything?
   - ✓ Schedule: Are we on-schedule or behind schedule and WHY?
   - ✓ Plans for next week:
     - ✓ Zunesis plans
     - ✓ Client plans

3. Face-to-face client completion presentation
   - ✓ What you asked us to do
   - ✓ What we accomplished
   - ✓ What we learned from this engagement
   - ✓ Our final documentation for the engagement
   - ✓ Any questions?
   - ✓ How else can we help you?

4. Weekly time cards provided by all Zunesis Engineers/Solution Architects by 8 a.m. MST the following Monday

CUSTOMER *first*

![zunesis]

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