EBOOK

THE ULTIMATE

PSA BUYER'S GUIDE FOR MSPS

Contents

Importance of a Modern, Cloud-Based PSA solution

Venturing into the new decade, the global professional services automation (PSA) market is poised to grow exceptionally. A report by Grand View Research, Inc. estimated its valuation to reach $16 billion by 2025 at a compound annual growth rate of 11.7 percent.[1] Factors propelling this growth include the cloud, deployment of online service delivery and a growing demand for cost-effective solutions that aid higher operational efficiency, scalability and flexibility.

At the forefront of businesses driving this demand are managed service providers (MSPs) and small and midsize businesses that are swiftly moving on from traditional ways of managing projects, resources and time. In fact, an increasing number of MSPs are opting for an integrated suite with all the functionalities they need, over a disparate array of solutions for each of those functions.

SaaS PSA solutions are responding to these changing needs by offering MSPs a welcome change from legacy PSA solutions. Built from the ground up for the cloud, modern PSA solutions offer quick and seamless implementation without hefty investment and accord greater flexibility, scalability and speed to MSPs.

Unlike their predecessors, SaaS PSA solutions typically offer an intuitive interface that allows MSPs to handle more with less. They help MSPs handle project management, service desk, time tracking, invoicing, resource planning, reporting, customer relationship management (CRM) and more.

This PSA Buyer's Guide walks you through the key considerations when choosing a PSA solution so that you can select one that best fits your needs. After all, purchasing smart IT management solutions at the right cost could give your business a competitive advantage.

Key Considerations When Selecting a PSA solution

☑ *Ease of Use and Ease of Deployment*

A PSA solution should allow IT teams to accomplish tasks without any hiccups. Whether it's adding new information to an employee's records or preparing key customer reports, everyday functions no longer involve switching between multiple interfaces. Additionally, an intuitive user interface (UI) enables your technicians to get up and running quickly. Every minute saved with workflow integrations and intuitive processes leads to greater IT operational efficiency.

Deploying the right PSA solution should not involve integration hassles or expensive hardware upgrades. The process should be smooth and the software should be easy to implement.

☑ *Flexible Billing*

When it comes to billing, nothing is more important than capturing every billable item. PSA tools should support different billing models such as bill by user and bill by device, as well as project based billing. Access to every billing detail ensures invoicing and expense reporting is precise and less time-consuming.

In addition, a key feature that most MSPs look for is the ease with which a PSA solution can integrate with popular accounting systems such as QuickBooks and Xero. An effective PSA solution makes this integration easy, allowing you to get up and running quickly.

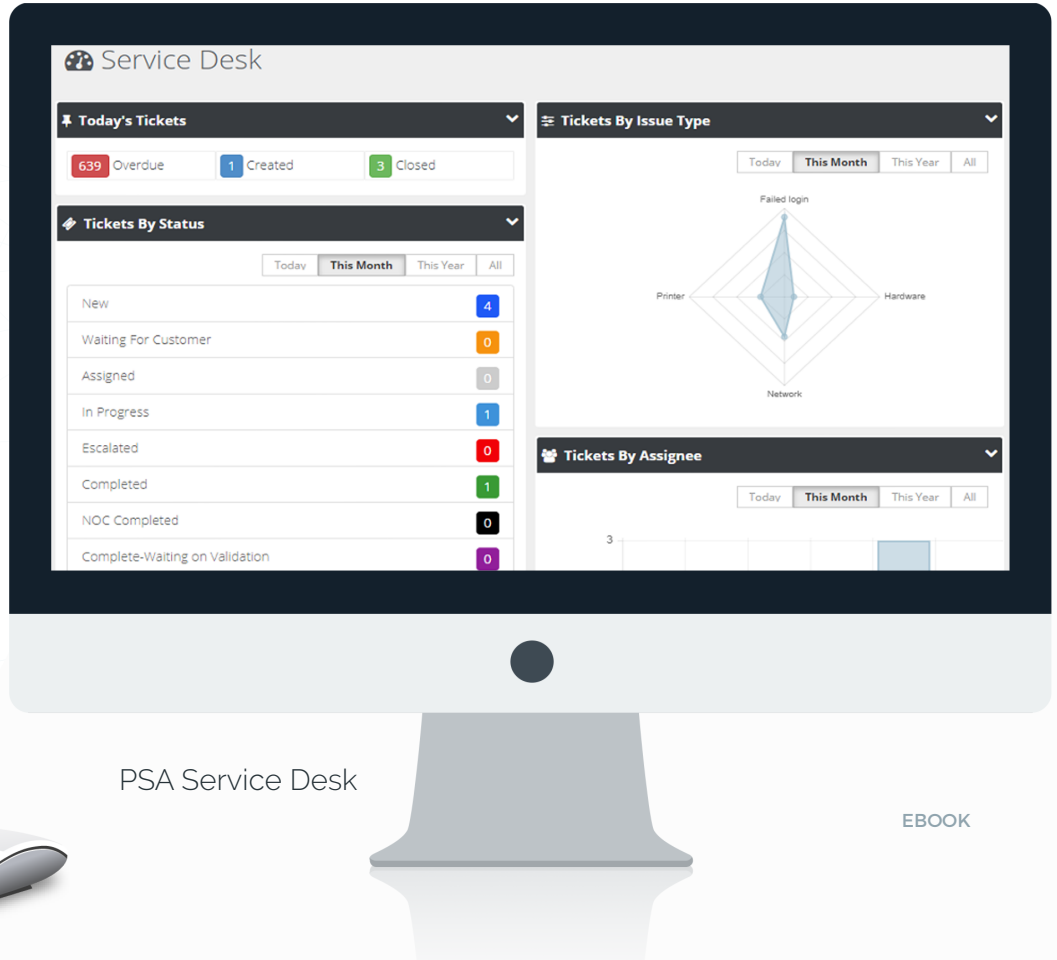
PSA Financial Dashboard

Enhanced Service Desk Management

A comprehensive and efficient service desk has a great impact on client satisfaction. At no point should technicians be wasting time determining which tickets have been closed and which ones need attention. Their sole focus should be on resolving tickets quickly to ensure the highest standards of customer satisfaction.

The best PSA solution for your business should allow technicians to view all tickets and related information on one pane of glass without having to open different applications to see all the necessary details. From an IT operations standpoint, the solution should make it easy to capture the customer issue in the ticket and assign the task to the appropriate technician(s) for resolution.

Advanced capabilities, such as auto-remediation of IT incidents and automatic ticket resolution, require workflow integration with the RMM solution. (More on this below).



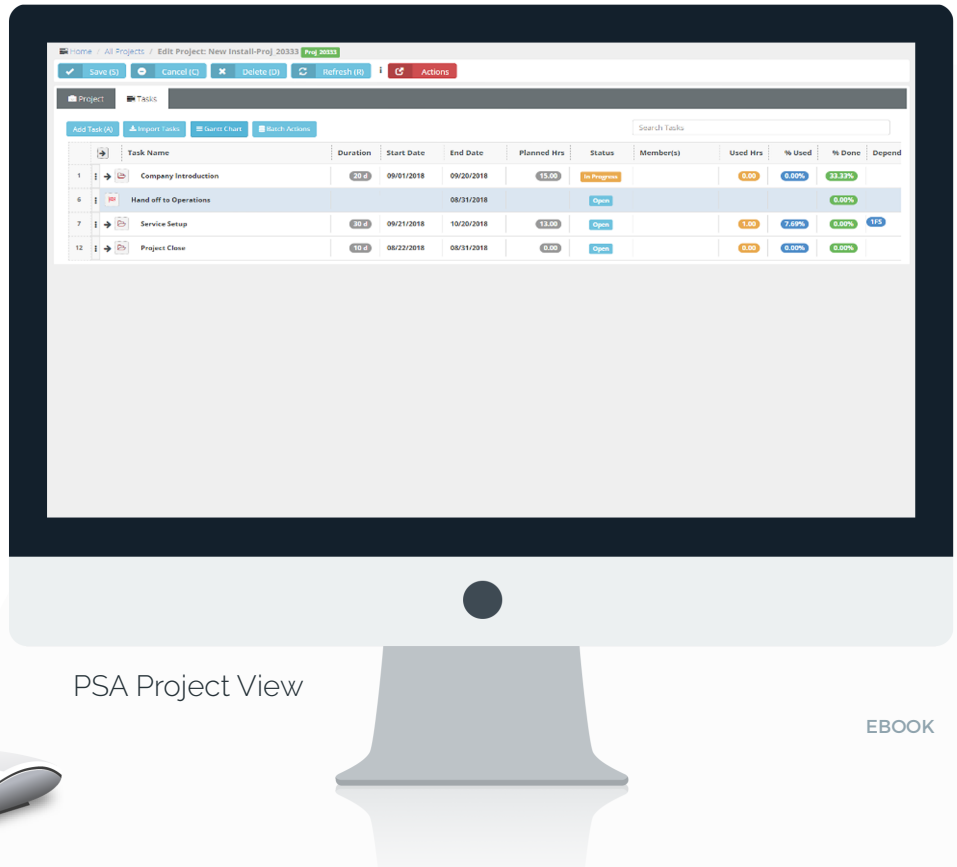
PSA Service Desk

Efficient Project Management

Effective project management involves setting up and tracking multiple items, including project budget, project costs, staffing assignments, task time, task dependencies, task due dates and much more. The project management features of a PSA solution should enable you to plan, track and deliver projects on time and on budget. Launching projects, assigning tasks and tracking project financials should not be an uphill climb. Your staff should be able to use the tool with minimal training. From planning tasks and managing project costs, to tracking resource utilization, you should be able to handle it all with a few clicks.

Comprehensiveness of the PSA Solution

Gone are the days when a PSA solution had to be supplemented with a collection of point tools. Doing so only leads to complicated workflows and adversely impacts efficiency, with every major MSP function taking longer than necessary. Therefore, the PSA solution should incorporate all major MSP business management functions, such as service desk (ticketing), CRM, finance and billing, project management, time and expense tracking, and inventory management into one comprehensive PSA product.



PSA Project View

☑ *Integrated workflows With RMM and IT Documentation*

Remote Monitoring and Management (RMM), PSA and IT documentation form the core management solutions of an MSP business. Consequently, these functions need to work together seamlessly. They need to be fully coordinated in order to avoid wasting time looking for information and jumping from one tool to another. Integrated workflows between PSA, RMM and IT documentation facilitate faster detection of IT incidents, speedier incident resolution and better service delivery. All of this leads to improved customer satisfaction and retention. Although customer retention is always important, in today's economic climate it is absolutely critical.

As noted earlier, advanced Service Desk functionality requires workflow integrations with other tools, such as the RMM and IT documentation solutions. Integration between PSA and RMM allows auto-remediation of tickets by providing the ability to run RMM automation scripts in the PSA solution.

Similarly, integration between the PSA and IT documentation solution allows related IT documents to be readily available inside the service ticket. This means that technicians have all the information available to help resolve the issue as quickly as possible.

With these types of features, you have the right mix for achieving maximum efficiency.

Choose the Fastest Growing PSA - Kaseya BMS

Kaseya's Business Management Solution (BMS) delivers all the features needed to run your MSP business. Kaseya built BMS specifically to help MSPs spend more time on revenue-generating tasks and less time on non-revenue-generating tasks, like billing and administrative functions. With a scalable, open architecture, BMS allows you to deliver higher quality IT managed services and grow your business.

Kaseya BMS makes it possible for you to manage all back-end functions at a cost significantly lower than other solutions, saving you money that you can invest in business growth.

Kaseya BMS is a SaaS solution that provides web-based access anywhere, anytime. It's also available on the Kaseya Fusion mobile app. In addition, it provides open and seamless integration with major accounting solutions such as QuickBooks and Xero.

Here is a list of immediate benefits that BMS brings to your MSP business.

☑ *Upfront Cost Savings*

Setting up BMS for your MSP business requires minimal upfront investment, both in terms of time and money. In fact, Kaseya BMS comes at about one-third of the price of competing solutions. After implementation, your technicians will be up to speed in no time since it comes with an easy-to-use, intuitive user interface. Simply put, BMS reduces upfront costs, helping you improve your bottom line in more ways than one.

☑ *Comprehensive Customer Relationship Management*

Using BMS' comprehensive and easy-to-use CRM, you can manage accounts effortlessly, access every piece of important information from one central location, fulfill customer needs quickly and ensure your entire team works in unison. This helps you focus on the entire sales journey – from tracking customer communication and setting tasks, to managing potential sales pipelines. With such robust visibility and control of the entire process, you have everything you need to land and retain new customers.

Effortless Project Management

Kaseya BMS lets you manage all your IT projects so that they run smoothly, are completed on time, stay profitable and add to customer satisfaction every step of the way. With BMS, you can create new projects within minutes, by either copying an existing project or using one of the built-in project templates. For existing projects, you can obtain a real-time status of staffing requirements or prevalent issues with just a few clicks.

For efficient expense tracking, you can view a financial summary of costs and pricing associated with every project. When it comes to billing, you can create new projects using a service quotation and link it to a corresponding contract. Even if no contract is linked, the project is billed based on the time and resources utilized. To sum it up, Kaseya BMS makes IT Project Management a smooth-sailing process with complete visibility, easy-to-manage tasks and availability of the right information for the right decisions.

Efficient Service Ticket Management

BMS offers a modern, intuitive user interface that makes it easy to create, manage and close service tickets. The Service Desk dashboard provides helpdesk managers with real-time information about the status and progress of tickets as they move through your company's support process. Workflow rules ensure tickets are attended to in a timely manner and generate alerts for complete visibility.

Improved Customer Satisfaction

When you resolve client issues quickly, their customer satisfaction grows. This helps you build stronger business relationships and explore new revenue opportunities. See real-time status information on all your customer support tickets in BMS so you can focus on the highest priority items first.

Other immediate benefits you receive with the BMS Service Desk include the ability to create and manage your SLAs, a centralized view into customer assets, and a scalable, multi-tenant cloud architecture that keeps up with your business' growth. Most importantly, BMS enables cohesive workflows between BMS and Kaseya's RMM tool, VSA, to resolve service tickets 40 percent faster. (See more on this below).

☑ *User Import from Active Directory*

The BMS integration with Azure Active Directory enables contacts and users to be automatically created and synced based on the users that are defined in one or more Active Directory tenants. This makes onboarding of new users in BMS a snap.

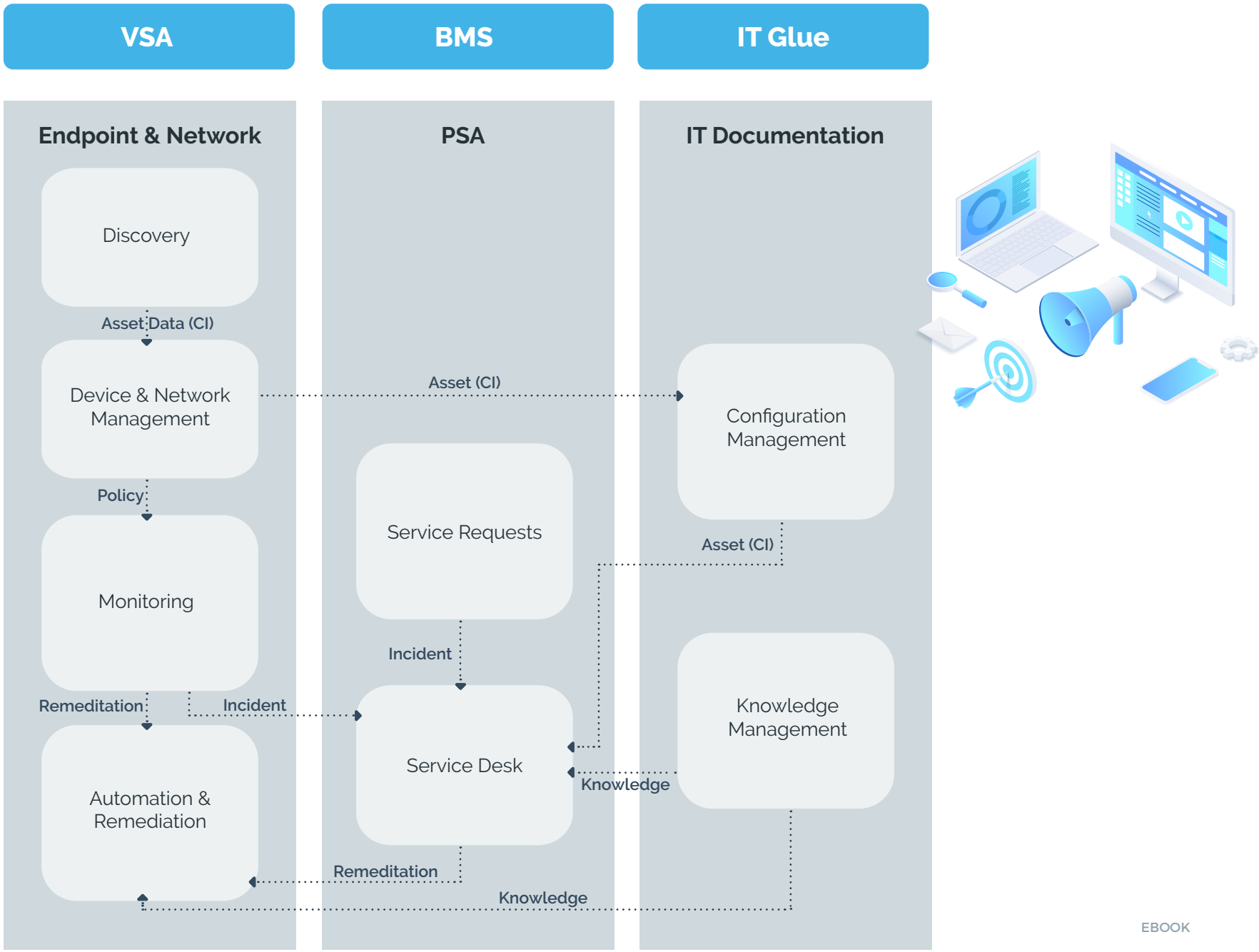
☑ *Simplified and Accurate Billing*

Every MSP strives to ensure all billable services are captured for accurate billing. Kaseya BMS supports bill by device, bill by user and project based billing, giving you the flexibility you need. For example, you can bill accounts by number of supported users and choose exactly which contacts are billable. It also simplifies all billing and finance processes. With BMS, functions such as expense tracking, time tracking, management of invoices and keeping all financial transactions under check go from being tedious to hassle-free. For example, you can automate your complete billing process and customize it by setting up contracts in BMS. BMS easily integrates with common applications such as QuickBooks and Xero to ensure no important data is lost in transit.

☑ *Integrated Workflows With Kaseya VSA and IT Glue*

Managing today's complex IT landscape with a set of disparate solutions is neither effective nor efficient. As a result, you are left with dissatisfied customers. In order to be a high-growth MSP, you require a cohesive platform that lets you manage endpoints and service ticketsfrom a single pane of glass.

Kaseya BMS is integrated with Kaseya's RMM tool, VSA, and IT documentation solution, IT Glue, for dramatically increased efficiency. This gives you the power to manage your IT infrastructure without having to switch between multiple disconnected solutions to get things done.


VSA
BMS
IT Glue
Endpoint & Network
PSA
IT Documentation
Discovery
Asset Data (CI)
Device & Network Management
Policy
Monitoring
Remediation
Incident
Automation & Remediation
Asset (CI)
Service Requests
Incident
Service Desk
Remediation
Knowledge
Configuration Management
Asset (CI)
Knowledge Management
Knowledge

Kaseya

Listed below are some of the exclusive benefits you get with BMS, VSA and IT Glue workflow integrations.

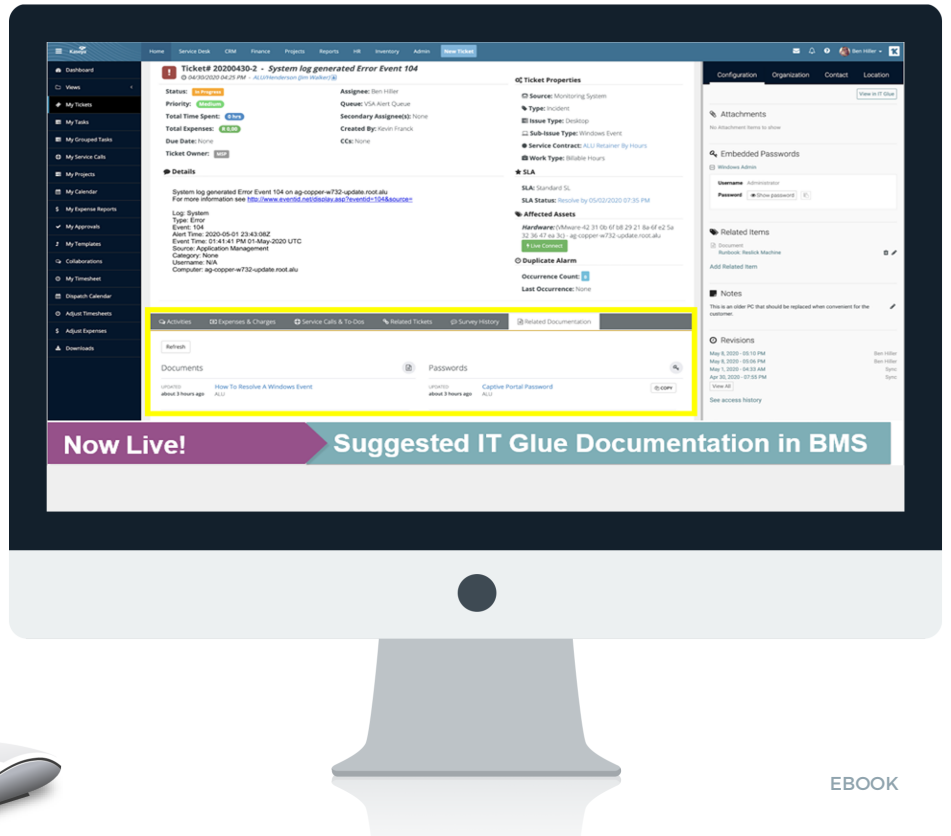
Prorated Billing

VSA and BMS integration allows you to activate agent-based prorated billing which captures agents to be billed based on the information available from VSA. It is a very useful feature that ensures billable endpoints are captured accurately without any manual intervention needed.

BMS provides prorated billing for bill by user, too. Proration is automatically applied when the number of billable users increases or decreases in the middle of the billing period. Proration is automatically calculated whether you bill at the beginning or the end of the billing period.

Related Documentation

While resolving an issue, a technician can lose precious time hunting for the information needed for speedy and accurate resolution. However, with IT Glue integrated into BMS, your technicians can easily find all the necessary documentation and knowledge from relevant content recommendations made by IT Glue, right in the BMS Service Desk. "Related documents" are specifically related to the incident described in the service ticket. This leads to more issues being resolved on the first call since the technician no longer has to dig up information by switching between multiple applications.



Auto-Remediation With BMS and VSA

What if your PSA could automatically resolve tickets and close them? It would ease the pressure on your helpdesk staff and boost productivity. The powerful combination of BMS and VSA makes it possible. When a new ticket is created, the auto-remediation process reviews the content of the ticket and tries to resolve it by utilizing workflows and running scripts (agent procedures) on the associated endpoint. It does all this without technician involvement. This feature helps by remediating a ticket automatically or assisting the technician to zero in on the issue. Either way, technician productivity receives a huge boost.

The Best Ticketing Experience

An efficient user interface is key to ensuring the best ticketing experience that boosts technician productivity and promotes faster ticket remediation.

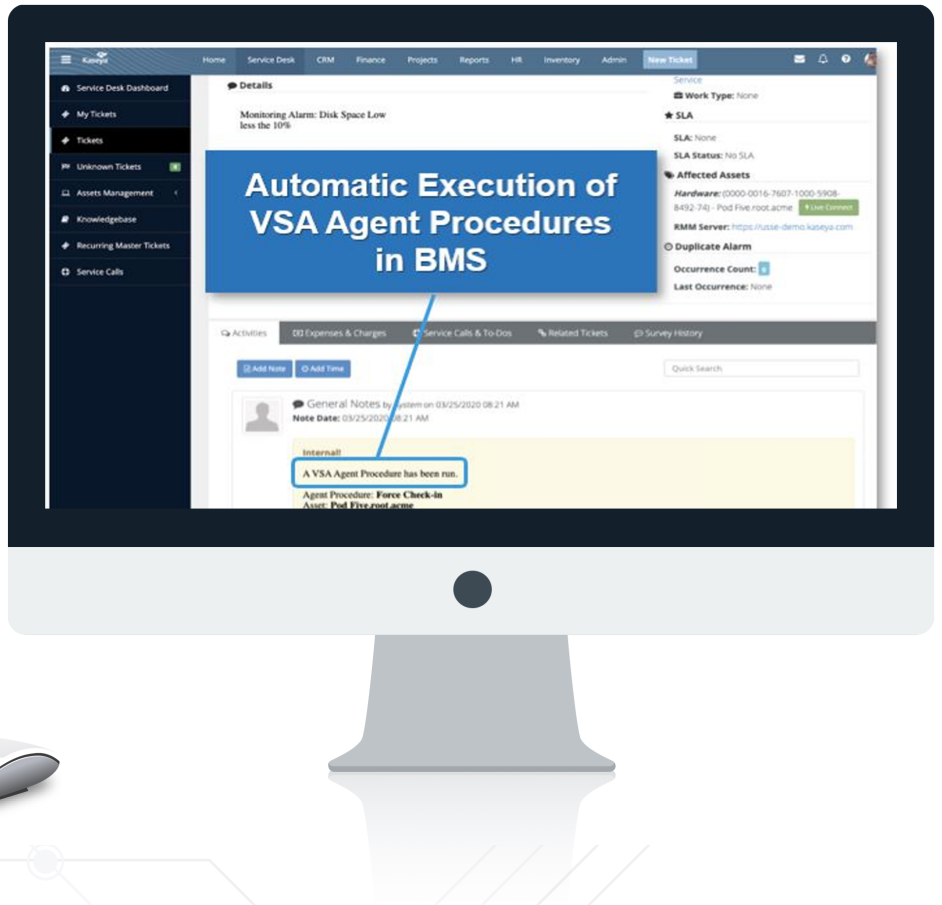
Designed to deliver high efficiency in ticket management through an intuitive user interface, the new ticketing feature eases navigation and enhances the user experience. Available in IT Glue and when used in conjunction with BMS, the new ticketing feature enables technicians to work on multiple tickets at the same time and boosts productivity.

Some of the major highlights of this new ticketing experience are:

- Fluid navigation with in-line editing and less clicks
- Easy access to multiple tickets in a single pane
- Visible ticket timers and convenient start-stop design
- Activities section with the latest correspondence at top view
- Quick finder shows most recent tickets submitted by customers
- Related Item feature — The ticket shows related items such as SOP (standard operating procedure) and passwords from IT Glue that can be used to help technicians resolve tickets faster
- Auto-remediation feature — Tickets can be auto-remediated/ preliminary diagnostics can be performed using the VSA agent procedure
- Ticket information is synchronized between IT Glue and BMS so that the technicians can always see the latest information and updates

Kaseya Fusion Mobile App

The power to manage your IT environment now lies in the palm of your hands. The Kaseya Fusion Mobile App enables your technicians to manage various functions through an easy-to-navigate user interface, right on their mobile devices. With fast access to the BMS Service Desk, VSA asset information, and the ability to run VSA automation scripts, technicians can significantly reduce turnaround times on service tickets leading to happier clients and a growing MSP business.



CONCLUSION

MSPs continuing to operate with legacy PSA solutions are at a disadvantage among their competitors who have moved to modern solutions. Built on and for today's technology, next-generation PSA solutions hold the key to higher technician efficiency, stronger client relationships and discovery of new business growth opportunities.

Contact Kaseya today to learn how BMS can help your business achieve sustained growth.

Schedule a demo today and add BMS to your IT arsenal.

References

1. https://www.grandviewresearch.com/press-release/global-psa-software-market

About Kaseya

Kaseya® is the leading provider of complete IT infrastructure management solutions for managed service providers (MSPs) and internal IT organizations. Through its open platform and customer-centric approach, Kaseya delivers best in breed technologies that allow organizations to efficiently manage, secure, automate and backup IT. Kaseya IT Complete is the most comprehensive, integrated IT management platform comprised of industry leading solutions from Kaseya, Unitrends, Rapidfire Tools, Spanning Cloud Apps, IT Glue and ID Agent. The platform empowers businesses to: command all of IT centrally; easily manage remote and distributed environments; simplify backup and disaster recovery; safeguard against cybersecurity attacks; effectively manage compliance and network assets; streamline IT documentation; and automate across IT management functions. Headquartered in Dublin, Ireland, Kaseya is privately held with a presence in over 20 countries. To learn more, visit www.kaseya.com.

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