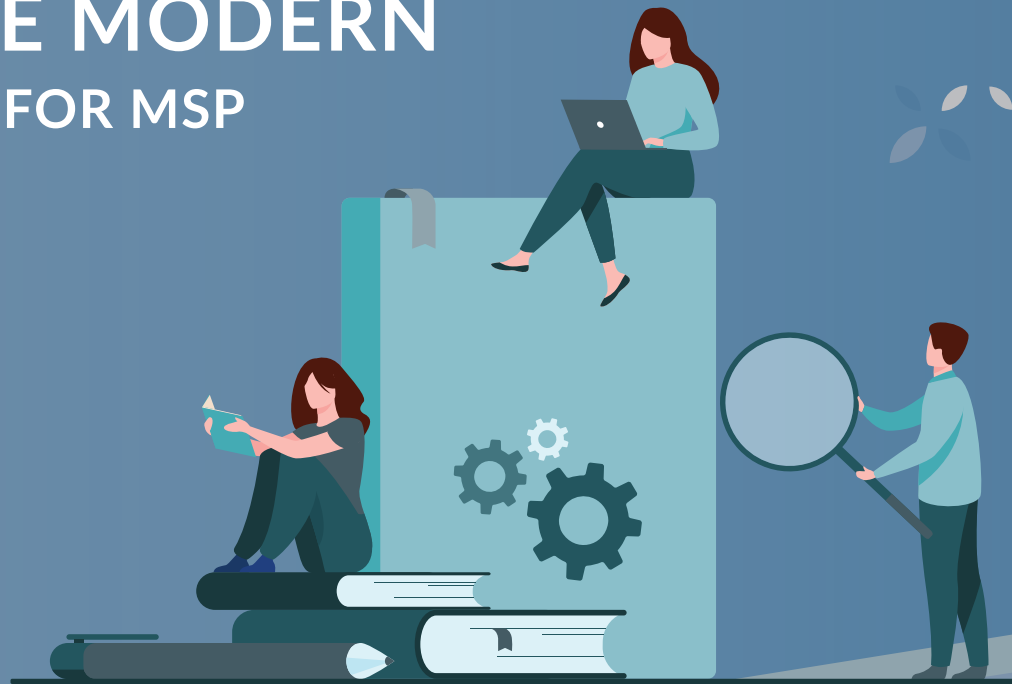


# BMS™

EBOOK

## THE ULTIMATE MODERN PSA BUYER'S GUIDE FOR MSP





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## Introduction

PSA is a key solution for all MSP businesses. Armed with the right PSA solution, you not only help your team work more efficiently but also manage your entire customer journey in a better way. The right PSA solution is critical for MSPs to run, grow and propel their business over the next decade and more. PSA helps MSPs enhance service delivery, meet SLAs, improve customer experience, get real-time data insights for better decision-making, simplify project planning and execution, minimize administrative costs and simplify billing.

To make the most of your PSA solution, you need a solution that grows with your business and enables you to achieve digital transformation. 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 functionality they need over a disparate array of solutions for each of those functions.



According to the [2022 Global MSP Benchmark Survey report](#), 78% of MSPs believe that integrating core applications like RMM, PSA and IT documentation helps drive bottom-line profits.





## Key considerations when selecting a modern PSA solution

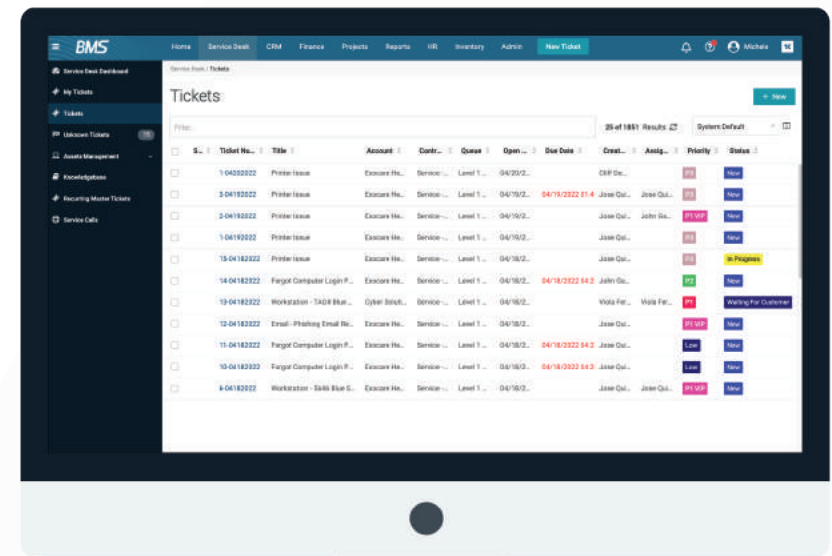
Given how critical a tool PSA is, businesses often find it challenging to find one that makes most sense for their unique requirements. There is an array of key aspects that you must consider when selecting a modern PSA solution that works for you.

### ✓ *Ease of use*

One of the most important things to consider when zeroing in on the right modern PSA solution is how easy it is to work with. The right modern PSA solution will enable you to accomplish different tasks, such as creating a contract, resolving a ticket, creating a quote or preparing key customer reports smoothly, all from the same screen, without pop-ups.

Features like in-line editing and keyboard shortcuts enable you to perform everyday tasks from the same dashboard without having to switch between multiple interfaces.

Additionally, the easier a PSA solution is to use, the shorter the learning curve. That said, the right modern PSA solution makes it easier for you to train and onboard your IT team so they can quickly start using the tool in their everyday work.



PSA Financial Dashboard

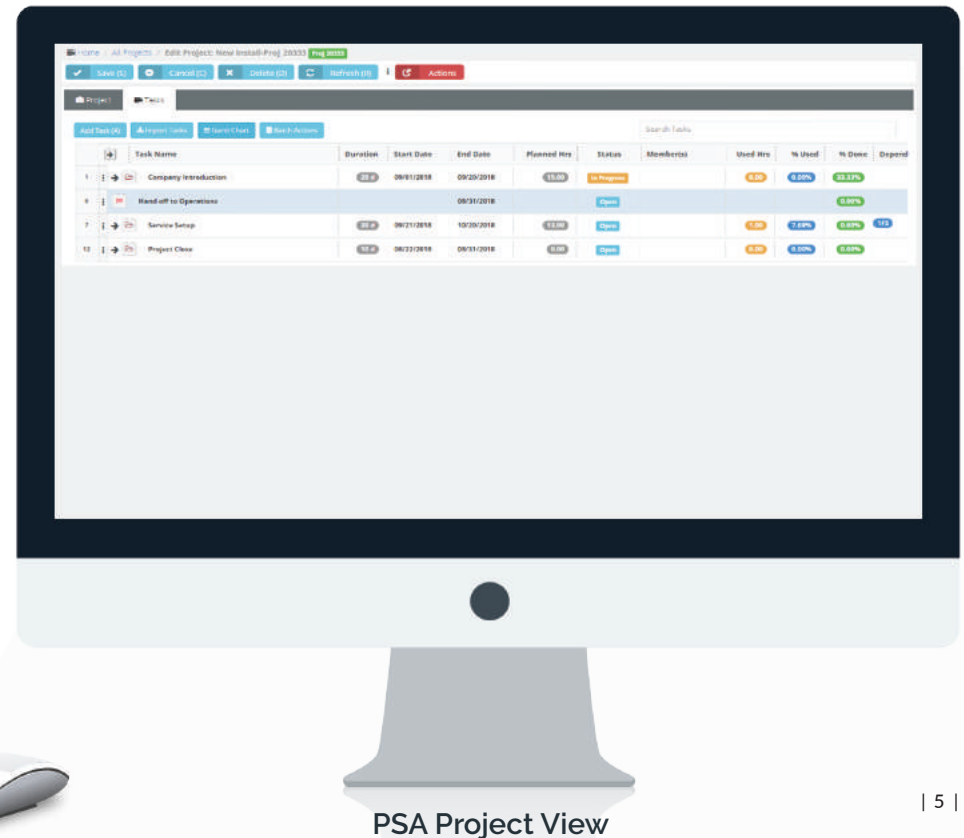


## ✓ *Comprehensiveness: End-to-end solution*

The right modern PSA solution should enable you to seamlessly manage the end-to-end journey of your customers from quoting and contract to service tickets, projects and billing. The comprehensiveness a PSA solution provides can be invaluable in enhancing service delivery and improving customer satisfaction.

Conducting your business with a collection of disjointed point tools complicates workflows and reduces efficiency with repetitive entries. You need a modern PSA solution that seamlessly integrates with your other core IT management applications and allows you to manage different workflows and processes from a single dashboard and minimizes errors.

A comprehensive PSA solution works cohesively with other core applications, boosting efficiency and freeing up time for technicians to focus on more complex, revenue-generating tasks.



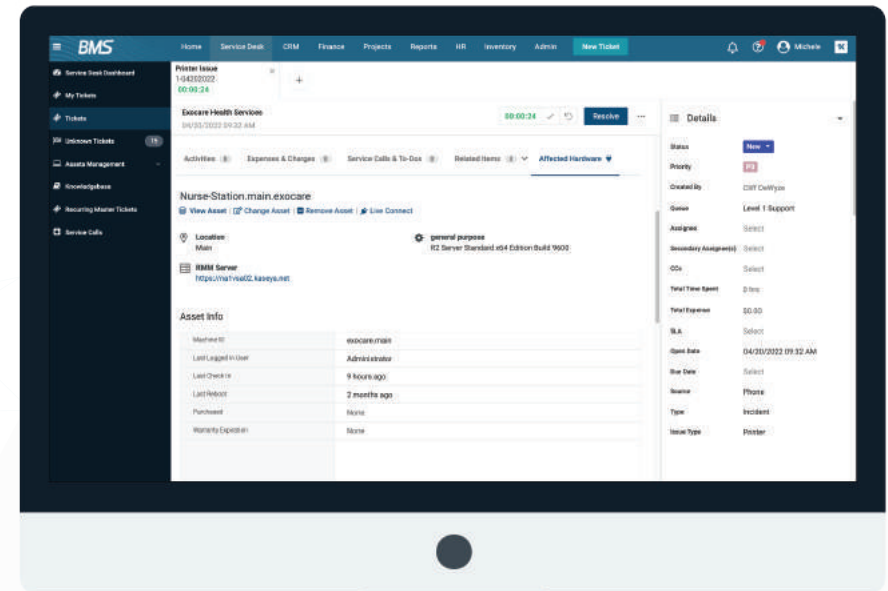


## ✓ Efficient service desk

Modern PSA solutions provide an efficient service desk functionality that not only helps technicians minimize ticket response and ticket resolution times, but also enhances service delivery, thus providing an exceptional customer experience.

To achieve maximum efficiency from your service desk, you need a streamlined user interface along with the ability to:

- Navigate with minimal clicks with in-line editing
- Keep track of time correctly with the ability to open and work on multiple tickets at the same time, with visible ticket timers and convenient start-stop design
- Resolve tickets with all information needed, such as passwords, SOPs, device details and remote access, in one screen
- See the latest correspondence and recent tickets submitted all in one screen



PSA Service Desk



### ✓ *Automated service desk*

Your PSA solution should provide an automated service desk that enables you to keep a pulse on your business, receive actionable alerts and perform real-time monitoring for:

- When a backup fails
- When a compromised user credential is found
- When a phishing attack is detected
- Unmet compliance requirements
- Discovered network vulnerabilities

Auto-remediation is another important PSA feature to look out for. What if your PSA could automatically resolve tickets and close them? It would ease much of the pressure on your help desk staff and boost productivity. The right modern PSA solution enables auto-remediation of incidents by automatically running RMM automation scripts based on endpoint alerts, without technician involvement.

### ✓ *Customized Workflows*

Your business today is different than it was yesterday, and tomorrow will usher in more changes. As your business evolves, you need an intuitive user interface that lets you build out your own process. Upgrade from simple to complex and get access to automation features and benefits without having to worry about writing new code. **Some common workflows to look out for include:**

- Automatic ticket triage based on keywords
- Automatic ticket updates based on client or technician response
- Automatic ticket resolution based on client response





### ✓ *Documentation-first service desk*

When resolving an issue, a technician can lose precious time hunting for information needed for speedy and accurate resolution. With the right modern PSA solution, you can find the necessary documentation and knowledge to resolve tickets quickly, all on the same screen. As per the [2022 Global MSP Benchmark Survey](#) results, 96% of the MSP respondents said they believe integrating core applications like RMM, PSA and IT documentation is important to their business.



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### ✓ *Streamlined quoting*

Spreadsheets aren't designed with quoting in mind, and that's what makes the whole process of invoicing frustrating and time consuming. Instead, you should focus on nurturing client relationships rather than searching for and cutting and pasting product pricing and descriptions into quotes. Not only is copy-paste time consuming, but it also introduces potential for errors that may lead to you losing out on a deal. Your PSA solution should enable you to pull pricing and product descriptions and images from live feeds of top distributors so you can get a professional quote out the door in minutes to increase win ratios.



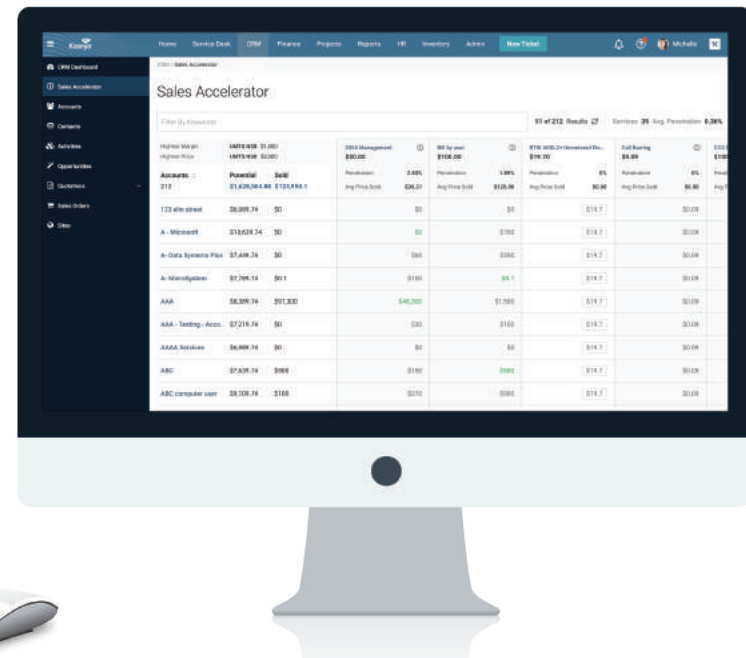


✔ *Easy-to-use customer relationship management*

The right PSA solution provides an easy-to-use customer relationship management functionality that allows you to effortlessly manage accounts, fulfil customer needs quickly and ensure that the entire team works in unison. It also allows you to manage the end-to-end sales journey, from tracking customer communication to setting up tasks and managing potential sales pipelines.

✔ *Effortless project management*

Effective project management involves setting up and tracking multiple items, including project budget, costs, staffing assignments, task time, task dependencies and task due dates. The right PSA solution enables you to plan, track and deliver projects on time and on budget.

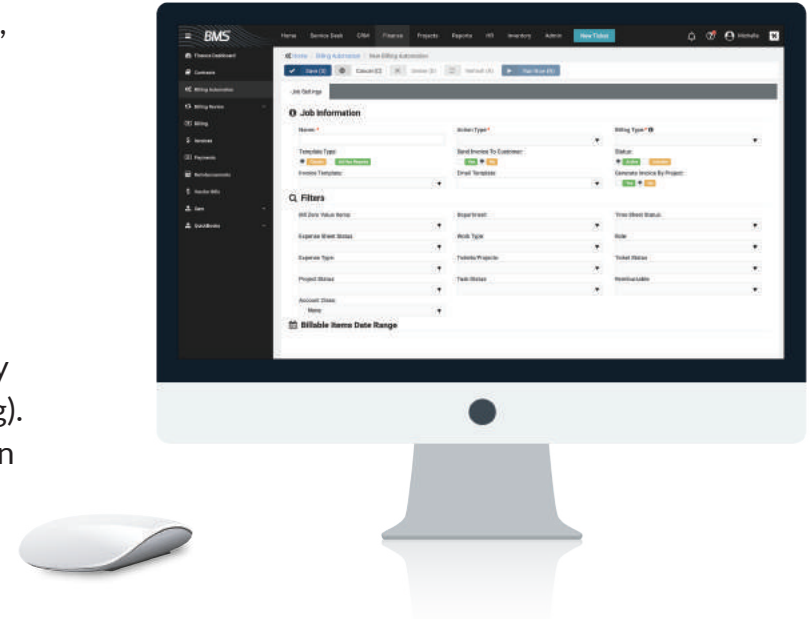




## ✓ Automated and accurate billing

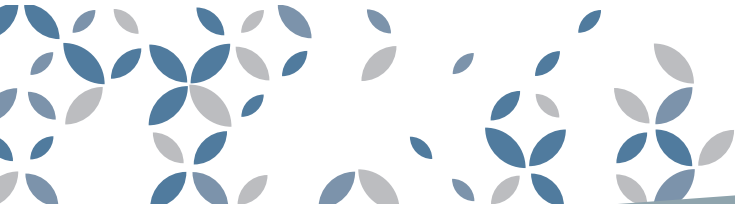
The right PSA solution must support all the different types of billing models, including time and materials (T&M), recurring services, and fixed price, to ensure that you can bill your customers the way you see fit.

Automated reconciliation is another major feature to look for in a PSA solution. Instead of manually reconciling on spreadsheets and manually updating the count in the contract, you can leverage your PSA solution to automatically collect the right data for inclusion on each invoice. Manual reconciliation not only costs you time and customers, but also can adversely impact your revenue because of erroneous billing (overbilling or underbilling). The right PSA solution automatically updates the data for inclusion based on the billing model you decide (per-device, per-user or cloud-services count).



The right PSA solution provides end-to-end billing automation that enables the technician to automatically post items, generate invoices, send out invoices to the right contact, and integrate with accounting and payment tools like QuickBooks, Xero, and ConnectBooster, to automate payment.

Prorated billing is another important function to look for in a PSA solution. With this feature, you can automatically calculate proration based on midcycle quantity changes so you don't end up leaving money on the table.





## ✓ Reporting

Growing your business requires streamlining your operations and running your processes efficiently. To reach a high level of efficiency, you need to identify not only the challenging areas in your business and rectify them quickly, but also the opportunistic areas that your business can take advantage of.

Modern PSA solutions offer powerful reporting that provides real-time insights and aligns your service desk with world-class standards. They allow you to utilize out-of-the-box dashboards and reports to highlight metrics that matter. Instead of reinventing the wheel or gathering data, modern PSA solutions enable you to focus on deriving insights and making the right business decisions quickly and confidently.

## ✓ Mobile app

With most businesses these days embracing the on-the-go style of working, technicians must be able to do all they can on a multiscreen setup from the palm of their hands. Whether you are onsite or out and about, you need to have the flexibility to access tickets, view asset information or even run automation scripts from your PSA mobile app so you can service your clients from anywhere.





## ✓ Pricing

When it comes to choosing a modern PSA solution with the right pricing, you must look at it as a whole – the total cost of ownership. You must also factor in the add-on services that the solution offers. Let's say that you have finally zeroed in on two solutions, both of which have similar features. In this case, it makes sense to pick the cheapest one, right? Not so fast!

You must check what's included or omitted from the proposal and whether the solution offers integrations you use, such as accounting, quoting, and payments. Also, check whether the PSA solution of your choice includes all business functions you need to manage the end-to-end customer journey.

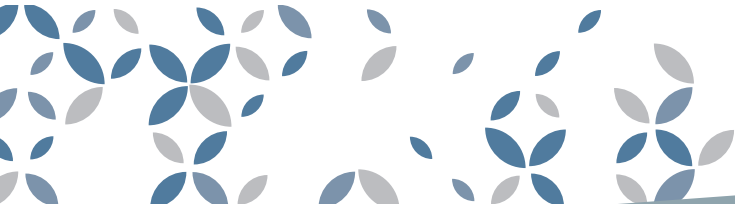
When selecting a PSA solution with the right pricing, you must also not forget about the soft costs associated with it, like training, implementation, and ease of use. Factoring in these auxiliary costs is imperative to making the right decision when choosing a PSA solution that works best for you.

## ✓ Migration and implementation

Moving to or implementing a modern PSA solution is no walk in the park. For the migration to be successful there must be strong collaboration between the organization and the vendor. One of the main prerequisites of a successful PSA migration is minimizing business disruption and ensuring continuity of operations.

### To achieve that, you must:

- Retain all your historical client troubleshooting and resolution summaries so that your institutional know-hows aren't lost
- Ensure that your essential data is fully migrated and any non-essential data (that isn't essential for business continuity) is safely stored for compliance and historical purposes
- Have 100% assurance that your workflows and integrations are configured as per the needs of the migration





## ✓ Training

Finally, you must ensure that adequate training is available for all types of learners. Provide a range of different training materials, including videos, knowledge base articles, webinars and how-to guides, to cater to the unique needs of different members of the team. Onboarding and training your team on the features and functionalities of your new PSA is essential to make the most of the solution for your business growth and profitability.

## Modernize your PSA to grow your MSP business

If you are looking to scale up your business operations without increasing your headcount, you need to beat the status quo. Deploy a modern PSA solution that grows with you as your business model and IT environment evolves, enabling you to drive higher technician efficiency, deliver end-to-end customer experience, nurture stronger client relationships and discover new business growth opportunities.

*Kaseya BMS is an end-to-end PSA solution that turbocharges technician productivity to help MSPs run and grow their business with ease.*



**WANT TO KNOW HOW?**

**SCHEDULE A DEMO TODAY!**

**TO UNLEASH YOUR BUSINESS' TRUE GROWTH POTENTIAL.**



### 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](http://www.kaseya.com).

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