

Broken Promises: Secrets You Need to Know About Choosing an Honest and Reliable Computer Consultant

A guide to helping the small business owner in selecting an honest, reliable, professional, dependable computer consultant to manage your businesses computer network.

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***Broken Promises: Secrets You Need to Know About
Choosing an Honest and Reliable Computer Consultant***

Your Success is Our Success

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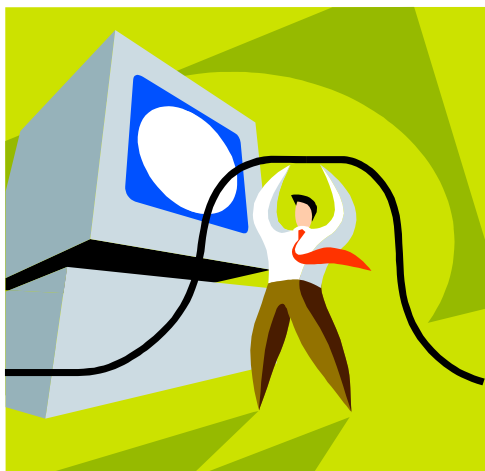
This book will help you discover:

- Why you need a computer consultant
- What a great computer consultant looks like
- How to locate one of the few truly great ones
- Your business cannot afford a bargain shop
- The true cost of bad advice
- Types of computer support offered
- Why you need Managed Services
- Disaster Recovery versus Backup
- Questions to ask before you hire
- Negotiating a win-win deal

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Chapter One

Why You Need a Computer Consultant

Every small business with more than a couple of computers is eventually going to need some help with their computer network. Finding a truly great computer consultant carries many of the same issues as finding a truly great employee. All of us who have been in the position to hire, understand how difficult of a task that can be.

Computers have become so complex and change so often and rapidly, that you can no longer safely consider maintaining your computer network yourself. Servers, PCs, iPads, network printers, access points, email on smart phones, scanners; the whole process becomes overwhelming if you do not know what you are doing. So, you need honest, competent, reliable IT help.

Back in the old days, computer guys used to sit around the office waiting on something to break at a client's office so the consultant's phone would ring and they could generate some billable revenue. It was unpredictable work and it gave clients unpredictable

results, because the consultant had no financial incentive to proactively stay on top of, or correct, problems on the client's network. Clients did not see the need to pay someone to "fix it, if it is not broken" and IT guys were not going to look for problems that no one was going to pay them to fix.

Today, that "break-fix" model is rapidly disappearing in favor of a "managed services" model. Managed Services is when a client outsources the administration of the client's computer network to an outside consultant. Then, the consultant assumes responsibility for and manages the network providing a defined set of computer network related services that are needed, either proactively or as the consultant determines, for a monthly fixed fee.

This monthly fee for service model transfers network uptime risk to the consultant, who is generally known as a Managed Service Provider (MSP), and financially incentivizes the MSP to keep the client network running smoothly at all times. Proactive management of a computer network, before something breaks, coupled with remote monitoring of servers and network health is generally seen today as the absolute best way to manage a computer network.

The Managed Service model is here. And, it is here to stay. Nearly all of the computer consultants that you are going to want working for you, and looking out

for your network, are going to be presenting you with this type of plan.

Determine Your Priorities

The first step to avoiding problems with a computer consultant is to determine your “satisfaction priorities”. Do you place a greater importance on response times or price? Is the quality of the work more important, or do you need it done fast? Is it critical that you have regular updates and status reports on your network, or is a quick e-mail now and again sufficient?

This is not to say that you cannot have it all; but if fast response is a priority, you need to clearly communicate that to your computer consultant *before* you hire him. You should also detail what you consider “fast” to mean.

Do you expect him to return your call within 15 minutes or 2 hours? Do you expect him to be on-site the same day you call, or within the week? Make sure you are both clear before entering into an agreement. Some computer-consulting firms may be more expensive, but may offer a higher quality of workmanship and customer service. Is that acceptable to you? Again, you need to determine this before entering into any project or agreement.

Once you have made a list of the qualities and characteristics that are most important to you, share this list with your prospective consultant to help him customize his services to suit you.

A Quick Word on Price

As with everything in life, you get what you pay for. The most expensive computer consultant will not necessarily be the best, but you should be cautious if your #1 priority is price. As a consumer, you know firsthand that you are always being offered competitive pricing on services and products. Businesses compete hard for your dollars and it is only natural for you to think of price first when looking for computer repair and consulting services.

However, **services** cannot usually be compared like tangible goods such as cars or office equipment. With products, you can equate features and benefits in an apples-to-apples comparison. With services, there are too many intangible aspects that cannot be compared easily.

If what you really want is cheap computer support, you can practically guarantee that you are going to have problems. The price will not seem so attractive when you have lost every file on your computer, or if the work has to be redone when it is discovered that it was not completed right in the first place.

If you rely heavily on your computer network and the information it contains, it only makes sense to take time and choose the most *competent* consultant possible, not the cheapest. Quality consultants can give you the expert advice and support you need. They can help lower your company's costs while increasing productivity, customer service, and sales. And, they will be there when you need them.

Quick Tip: Have you heard the old saying?

You can have it: Fast, Cheap, Good

Pick any two.

Start Small

Before you hire your computer consultant to install a new network, hire him to do a small repair or network audit. This will give you the opportunity to see if he shows up on time, follows through, and is enjoyable to work with. Never jump into a major project until you have been happy with the consultant's work on a smaller project.

Demand a Fixed Price

Many computer consultants charge by the hour for projects instead of quoting a fixed rate. This works great for them, but is dangerous for you. Unless you have an established, high-trust relationship with your consultant

(or a bottomless pit of money), never agree to this type of contract. This gives your consultant a wide-open field to take as long as he wants working on your project—and it actually benefits him if he does. Instead, ask him for a fixed fee that details exactly what results he will deliver for an agreed budget.

Get Everything in Writing

Getting everything in writing is one of the most important things you can do to avoid being taken advantage of by an incompetent or less-than-ethical consultant. This includes:

- A project timeline and completion date
- A written service guarantee
- An exact budget and payment schedule
- Any and all expectations you have for deliverables
- When and how you will receive project updates
- Your responsibilities as the client
- What happens if you are not satisfied
- What happens if your project runs over the designated completion date

Do Your Research

We have discussed what to look for—actually demand—from your computer consultant. Some of

those characteristics will need to be researched; do not skip those steps to save time. Ask your prospective consultant to provide the information you are looking for as part of his proposal. If he does not, or will not, cross him off your list of potential partners.

Communicate Your Concerns

Some people are too shy to say what is really on their mind for fear of appearing rude or unreasonable. But, if you have any concerns, questions, or reservations, you need to voice them to your prospective consultant before signing the contract, and ask him to address *in the contract* how he will overcome those concerns if you hire him for the project.

If you are concerned that he will not return your calls fast enough, let him know. If you are afraid, he might not be able to handle the job, be honest, and tell him. You do not have to be harsh or disagreeable; simply let him know that you have a few concerns.



Chapter Two

What a Great Computer Consultant Looks Like

Finding a really stellar, over-the-top, get-it-done group that continually looks out for the client's best interests, understands small business problems as well as how to install, configure and maintain a computer network, is a tall order.

The ideal candidate for the work you need done is going to be a computer consulting company:

- that is proactive in dealing with your business
- has 3 – 12 technicians (bigger isn't better for small business)
- has been in business for longer than 5 years
- is a Microsoft Partner
- has other Partner certifications such as Cisco, Dell, HP
- has a remote monitoring and management (RMM) tool in place
- offers an offsite Backup/Disaster Recovery program (BUDR)

- has a web-based trouble ticketing system

You need a company that understands proactive maintenance. The consultant you select has to understand the concept of early discovery of potential issues, getting in front of those problems quickly and getting them solved before they become a disruption to your business.

Your MSP consultant should have enough staff members that allow them to service multiple accounts simultaneously. You cannot afford to do business with a “one-man band”. Having sufficient number of staff allows the consultant staff to be at different clients at the same time.

Experience in this industry is generally equated with longevity. A consultant who has been in business for better than 5 years has been around long enough to have learned the ropes and gathered some experience. At this stage of the game, the consultant should be able to provide written or video testimonials from their current clients to aid you in the decision making process.

Industry partnerships and certifications, such as the Microsoft Partner certification, are another indicator that your prospective consultant is in this for the long haul and takes their business seriously. Few of the fly-by-night/one-man-band consultants are willing

to invest the time, effort and energy in obtaining and maintaining vendor certifications.

Part of the Managed Services model calls for proactive Remote Monitoring and Management (RMM) of the client network. Most RMM tools also include the ability to remote control the machines on the client network. RMM tools allow the consultant to run software maintenance programs, assist users remotely without having to come onsite and to monitor the network 24/7/365. RMM software is expensive. It is not unusual for a consultant to have to spend several thousand dollars per month to purchase and maintain their RMM software.

Disaster Recovery/Offsite Backup has recently become affordable for Small Businesses. Previously only available to those enterprise-sized businesses with very deep pockets, almost any business can protect itself with an onsite/offsite/instant-recovery Disaster Recovery solution. Any consultant who is looking out for the client's best interests should be educating and then demanding that the client use this solution. A lot of businesses did not survive Hurricanes, Isabel, Katrina, Irene and Sandy over the last decade. If those businesses had an offsite Disaster Recovery solution, the outcomes would have been substantially different.

Computer consultants should be using computers and software to manage their clients and their client's service calls. Your consultant should have

Professional Services Automation (PSA) trouble-ticket software that allows you to log your own service calls at your leisure, look at the status of your calls, look at the comments entered by the technician and generally see the status of a service order.

Any computer consultant who is serious about their profession must maintain Errors and Omissions insurance, along with Workman's Compensation insurance and General Business Liability insurance. If your prospective consultant does not see the need or has otherwise failed to procure insurance for their business and yours, then you need to move on to the next candidate.



Chapter Three

How to Locate One of The Truly Great Ones

Finding a great computer consultant takes time. However, here are five ways that can speed up the process:

- **Check with businesses similar to yours.** Most consultants are reached by referrals through their previous clients. Call your peers and contemporaries to see who they are currently using and gauge their satisfaction level with that consultant.
- **Use the Internet.** Most consultants maintain a web site showing their services and offerings. You can check a more specific listing, such as the Consultants and Consulting Organizations Directory published by Gale Cengage Learning. The Better Business Bureau and other groups also publish directories in many areas.
- **Check with your own professional organization.** Some consultants list or advertise themselves with professional organizations in the fields they serve.
- **Check with your accountant or attorney.** Many accounting firms and attorney offices should be able to refer you to computer consultants

that they know or have worked with in the past.

- **Check with the Better Business Bureau or the Chamber of Commerce in your area.** The BBB collects complaints and can help you screen out consultants with bad reputations.

You may also want to check with a consulting or computer trade organization. Some organizations to note are: PATCA (The Professional and Technical Consultants Association), IEEE (Institute of Electrical and Electronic Engineers) and ACM (Association for Computing Machinery). You may also want to check with a local computer user's group. A good place to find them is in the business calendar of your newspaper.

There are numerous questions you need to ask of your prospective computer consultant. While some are related to their technical abilities, the balance are personality and thought-process related. You are about to enter into a serious relationship that deals with one of your company's most critical assets. The computer consultant you choose must think and act like a businessperson. Too many consultants are technical in nature, but, do not have the personality necessary to deal calmly and rationally with you and your staff.

The firm you hire is going to become your virtual Chief Information Officer (CIO) and will be an important resource in leading your technology initiatives through the next few years. This group needs to be intelligent, proactive, engaging and polite

while offering advice and guidance to your senior management on technology related issues.

Here are some questions you might pose to your prospects:

1. Do you have a "day job"? Are you moonlighting?

Depending on your needs, either you will be comfortable with someone who is only available part time, or you will not. Most firms with a server and more than 10 PCs will need someone who is committed to providing tech service full time.

2. Are there any other people who work at your company?

Find out if the consultant is a solo practitioner or part of a larger firm. If you discover he is part of a consulting firm, find out if others from the firm will be involved with your account, and what their backgrounds, specialties, and history with the company are.

3. What "size" is your typical client?

Determine what size business the consultant is most experienced in dealing with. Signing on with a consultant who works mostly with large companies might mean he has great experience working with many PCs and employees, but it also means he is used to companies with bigger budgets than yours is.

4. Does your company specialize in any particular products and services?

Find out what software and hardware the company specializes in fixing, installing, and maintaining as well as the service vendors it might work with. If you are a Physician's office then you are going to need a consultant familiar with Practice Management and Electronic Health Record software. Also, discover what types of technology they shy away from.

5. Does your company resell products, such as hardware and software? Are there any other vendors, such as ISPs or telephone companies that your firm acts as an agent for?

Signing up with a reseller could put you in a position of only using the products their selling. Working with a true consultant, however, you will be able to shop for your choice of products and services.

6. What are your payment terms, rates and minimums?

Discover what kind of work is billable vs. non-billable. Also, ask how many the firm charges for travel time, phone support, e-mail/online support, and remote support, and whether there is an increased charge for after-hours emergencies.

7. Can you provide references?

Ask the consultant to discuss long-term and more recent accounts with you to help get a better sense of his experience and abilities.

Also, ask about those clients who did not work out and why they did not work out. This could reveal any potential pitfalls of a relationship with the consultant before you sign on with him.

8. How do you keep up with new tech developments?

What is new today can be old tomorrow, so it is important that the consultant you work with knows about the latest tools and trends. Find out how the consultant keeps up with technology.

9. What kind of user and technical training can you provide?

The more handholding a consultant does, the more money he makes. Ask the consultant whether or not he would be willing to train you or someone else internally to become more self-sufficient.

10. What am I paying for?

Besides understanding, the exact services you'll be paying for, you'll also want to know what type of overhead is built into the consultant's rate structure. This way you'll get a good feel for whether you're paying for fancy cars and posh office space or working with someone you feel you're getting the most bang for your buck from.



Chapter Four

Your Business Cannot Afford a Bargain Basement Consultant

If you are in business for yourself or if you are running a business as the Office Manager for someone else and you are reading this book, you are already exhibiting characteristics of a company looking for above average results.

Every network that we have inherited from another computer consultant has had problems that caused so much frustration with the client that they elected to take the drastic step of replacing the consultant.

A computer consultant needs to bring the focus and long-term strategic thinking abilities of a Chief Information Officer to the table when hired on at a client. The position of computer consultant is that of “trusted advisor” and all the parties involved need to acknowledge that role.

Warning Signs That You Hired The Wrong IT Guy

1. Becomes defensive or argumentative when you ask about project costs or completion dates, or when you question his recommendations.
2. Will not guarantee the work or your satisfaction.
3. Talks down to you, uses “geek speak”, and makes you feel stupid when you question his recommendations or work.
4. Is consistently late or rushed, and misses deadlines without an explanation or apology.
5. Leaves your office a mess (wires and cables exposed, furniture out of place).
6. Looks sloppy or disheveled.
7. Uses high-pressure or scare tactics to get you to buy.
8. Does not explain your options for resolving a problem or completing a project; it is basically his way or the highway.
9. Does not follow up after completing a project.
10. Conducts personal business or supports other clients from your office when he is supposed to be working on your project or network.
11. Never takes a proactive approach to supporting your network, and does not offer recommendations

to help you secure your network, save money or improve your company's productivity.

12. Does not offer a preventive-maintenance or monitoring program to ensure that your network is protected from viruses, hackers, data loss, downtime, or other problems.

Mistakes To Avoid When Choosing A Computer Consultant

1. Choosing a computer consultant based on a single phone call.

We recommend you invite them into your office and ask them for a written proposal. Be clear on what your expectations are and what type of problems you want them to resolve. A competent professional should offer to do an audit of your network to diagnose your system BEFORE quoting you anything. After all, would you take a doctor's word that you need surgery if they had not done x-rays or other diagnostics? Of course not! Prescription without diagnosis is malpractice.

2. **Choosing a computer consultant that does not have a written money-back guarantee.**

In our view, a good consulting firm should be accountable for their services and fixing things RIGHT. If you are not pleased with a job that was done, they should (at a minimum) make it right for free; and if they simply cannot resolve an issue to YOUR satisfaction, you should not get stuck with the bill.

Plus, the fact that they stand behind their work with a money-back guarantee shows they have confidence in themselves to make you a happy client. And, do not fall for the, “We don’t offer one because people will take advantage of us”, routine. In our experience, MOST people just want an honest service at a reasonable price. If you give them that, they are happy to pay. Are there a few unethical customers out there? Of course, but they are the minority, and we would rather bite the bullet on the very few dishonest folks so we can gain the trust and confidence of the majority of clients who just want their problems fixed fast and fixed right.

3. **Choosing a computer consultant without speaking to several of their current clients.**

Check their references! Do not just take the sales person’s word that they are good – ask to

speak to at least 3 or 4 clients that are similar in size and scope to you. If they hesitate or cannot provide you with references, do not trust them! Another good sign is that they should have multiple client testimonials and success stories posted on their web site and throughout their marketing collateral. A lack of this may be a sign that they do not HAVE clients who are happy enough to provide a good reference – again, a warning sign.

4. **Choosing a computer consultant who cannot remotely monitor, update, and support your network.**

In this day and age, a computer consultant who does not do this is living in the Stone Age. You want someone to do this because it will dramatically increase your network's security and will enable him or her to do faster repairs. That is not to say they should not come onsite; but remote monitoring and repairs make fixing problems FASTER for YOU and help AVOID problems from cropping up in the first place.

5. **Choosing a computer consultant who does not have industry certifications.** Industry certifications (Microsoft, Cisco, Dell, Trend Micro, Sonicwall, etc.) indicate a higher level of competence and a commitment to continuing education.



Chapter Five

Bad Advice and What It Really Costs You

Every business, large or small, depends on computers and technology at some level to operate. If you have owned a computer for more than five minutes, you know that no one is exempt from computer problems, system crashes, and downtime. While all business owners can relate to the sheer frustration these issues create, few can put a dollar figure to the actual hard cost to their business. That is because so much of it is the soft costs that are related to productivity, hours worked and time lost.

What makes the cost of computer downtime even more difficult to determine is the fact that no business is “average” and therefore statistics that quantify the cost of downtime for the average company are worthless. Each business has its own cost of doing business and any interruption carries a different cost depending on the nature of the business.

However, no business owner can deny that an interruption in their business costs them money, whether that interruption is caused by a server crash, hardware failure or some other outside force. If you've ever had your business grind to a screeching halt because you and your employees could not access the data or systems necessary for operations, you must have some idea of the frustration and financial loss to your business, even if you didn't put a pencil to figuring out the exact cost.

Take a look at these statistics:

- Companies experience an average of 501 hours of network downtime every year, and the overall downtime costs an average of 3.6% of annual revenue. *(Source: The Costs of Enterprise Downtime, Infonetics Research)*
- 93% of companies that lost their data center for 10 days or more due to a disaster filed for bankruptcy within one year of the disaster, and 50% filed for bankruptcy immediately. *(Source: National Archives & Records Administration in Washington)*
- 20% of small to medium businesses will suffer a major disaster causing loss of critical data every 5 years. *(Source: Richmond House Group)*
- Last year, 40% of small to medium businesses that manage their own network and use the Internet for

more than e-mail had their network accessed by a hacker, and more than 50% did not even know they were attacked. *(Source: Gartner Group)*

- Of those companies participating in the Contingency Planning & Management Cost of Downtime Survey, 46% said each hour of downtime would cost their companies up to \$50,000; 28% said each hour would cost between \$51,000 and \$250,000; 18% said each hour would cost between \$251,000 and \$1 million; and 8% said it would cost their companies more than \$1 million per hour. *(Source: Cost of Downtime Survey Results, 2001)*
- Cybercriminals stole an average of \$900 from each of 3 million Americans in the past year, and that does not include the hundreds of thousands of PCs rendered useless by spyware. *(Source: Gartner Group)*

But, even if you do not factor in the soft costs of lost productivity, there is a hard cost of repairing and restoring your network. Most major network repairs will require an average of 4-8 hours to get the network back up and running. In addition, the average consultants cannot get on-site to resolve the problem for 24 to 48 hours. That means your network could be down for one to two days.

Since the computer consultants may charge up to \$195 per hour, plus a trip fee and a surcharge if it is an emergency, the average cost of these repairs can easily

exceed \$1,000 per trip. Over a year, this can result in thousands of dollars in costs, not including hardware and software or lost sales and work hours. Of course, those numbers quickly multiply with larger, more complex networks.

Quick Tip: If you don't pick the very best IT Consultant you can find, then you may end up being underserved by the consultant you do hire because you will eventually lower your expectations to the abilities of the consultant, instead of holding the consultant to a higher standard.

More Costs of Bad Advice

In addition to downtime, there is another expense that most business owners do not consider: the cost of bad advice when an inexperienced consultant recommends a product, service or project that is unnecessary or incorrect for your specific situation.

Another form of bad advice is when a computer consultant does not take into consideration all the pitfalls and situations that will arise when implementing your project, and grossly underestimates the time and money it will take to successfully complete it. When a consultant makes this mistake, your project ends up

way over schedule, and costs you 2-3 times as much in unexpected fees, additional hardware, and software.

It's gotten so bad that *Network World* recently noted, "Increasingly, IT customers are crying malpractice and railing against slipped implementation schedules, compounded consulting fees, and disappointing product performance."

Although the price of bad advice is hard to measure, if you have ever been disappointed or burned by a so-called IT expert, you know the costs to your business are painfully high.

Here are just a few of the ways bad IT advice can cost you:

- Paying for unnecessary projects, software, or hardware.
- Paying too much for repairs, software, and hardware.
- Accumulating downtime, unstable networks, data loss, and security breaches.
- Getting stuck with a "solution" that does not really solve your problems.
- Increasing the time and work you and your employees invest in rolling out a project.
- Paying double by having a competent consultant fix what the first person messed up or complete the project you originally wanted implemented.

- Incurring litigation costs to get your money back from a technician who ripped you off.
- Dealing with the sheer frustration of the problems resulting from poor advice.

Trouble is, it is hard to know that you are paying for bad advice until you are already neck-deep into the problems. By the time you get the first inkling that you hired the wrong person, you have already invested a considerable amount of time and money, making it difficult, if not impossible, to end the project and look for someone else. That is why the information in this book is so critical. Your best defense against all this heartache is to become an educated consumer who does your homework.



Chapter Six

Types of Computer Support Offered

With the constant changes to technology and the daily development of new threats, even a small 10 PC network requires ongoing maintenance from a highly-trained consultant to ward off viruses, spam, spyware, slowness, user errors and data loss. However, hiring a full-time IT person is not always feasible for small to medium businesses. If your business cannot justify hiring an IT manager, you only have three options for computer support:

Option #1: Do not do anything.

This is foolish, but we see it every day: businesses that do not pay attention to the care and maintenance of their network until it stops working. Then they are forced to call in an expert to repair or replace whatever caused the problem.

This reactive model of network support is similar to ignoring oil and filter changes in your car until smoke

starts pouring out from under the hood. Taking a reactive approach to network maintenance is a surefire path to extensive downtime, lost data and excessive spending on IT support, not to mention major disruptions in staff productivity, sales, production, and customer service. Even if your computer network appears to be working fine, there are a number of daily, weekly, and monthly maintenance tasks that must be performed to keep your data secure and your system running smoothly.

- Virus scans and updates
- Security patches and updates
- System backups and disaster-recovery planning
- Spyware detection and removal
- Server and desktop optimization
- Employee policies and monitoring
- Intrusion detection
- Spam filtering

If you run specialized medical practice-management, customer-relationship management, or production software, or if you have multiple locations, a wireless network, highly sensitive data (as in financial or medical organizations), or other specialized needs, the list will get longer. Remember, your computer network is just like your car or your house. They all need regular maintenance to avoid problems.

If you learn only one lesson from this book, I hope it will be to ***proactively monitor, maintain, and secure*** your network instead of choosing to react to network and computer problems as they arise. Aside from a telephone, your computer network and the data on it are undoubtedly the most important business tools in your office. When they are unavailable, all productive work comes to a grinding halt.

As the old saying goes, an ounce of prevention is worth a pound of cure; this goes double for your computer network. Unfortunately, most business owners are under the incorrect assumption that regular computer maintenance is not necessary, and therefore only call in an experienced consultant when something goes wrong. As we stated previously, this model of “break-fix” computer support is not a good idea, especially if the operation of your network and the data on it are important to your business.

Option #2: Do it yourself.

Although this option is better than doing nothing, it still puts you at risk for computer network disasters. Instead of hiring a qualified consultant to support your network, you designate the most technically knowledgeable person on staff to be your makeshift IT manager, and bring in outside help only when you run into a network crisis you cannot solve.

The problem is, you are pulling these people away from the real job you hired them to do, and unless they have the time to stay up-to-date on the latest developments in IT support, security, and management, they do not have the skills or time required to properly maintain and secure your network and could actually worsen the situation. This inevitably results in a network that is ill maintained and unstable, which may cause excessive downtime, overspending on IT support, and expensive recovery costs.

Another variation of this option is to get your neighbor's kid or a friend to provide computer support on a part-time basis. This is a mistake for two reasons: First, they may not be fully qualified to handle the job, so they could make things worse. They may be able to fix the problem in the short-term, but they might not have the time or expertise to get to the root of the matter. Second, they may not always be available when you need them. If your server goes down at 9:00 AM, they might not be able to come until later that day or evening, or next week, causing you to lose a full day or more of productivity.

Also, as mentioned previously, they are providing reactive support. As with all things in life and business, it is far less expensive to prevent problems than to clean them up. If your part-time technician is not performing

regular maintenance and monitoring of your network, you are susceptible to more problems.

Option #3: Outsource your support to a competent consultant.

Obviously, this is going to be the fastest and surest way to solve your computer problems. However, there are an ever-growing number of companies springing up across the country that offer computer repair services and support, which makes it difficult for a business owner to know which vendor is right for them.

As it stands today, there are five types of external computer support you can use:

1. Vendor support:

This is phone support provided by Dell, HP, Microsoft, or any of the big software and hardware vendors. If you have ever tried to get technical support from a large manufacturer or store, you know how frustrating it can be.

First, many vendors do not provide free support. If they do, it is usually very limited and only available by e-mail or Web response forms. If you are lucky enough to reach the support department, you will end up going through a maze of phone options before you get a live person, and then the person is usually a nontechnical

customer service representative who cannot provide any real assistance. In most cases, they will be located in another country, and may even be difficult to understand (many technology companies outsource their customer service because it is cheaper than employing U.S. workers). You will also get a different person every time you call, and most will not have any particular knowledge about your business or what you are trying to achieve.

Here is another problem with vendor support: They are not going to help you solve problems that are not related directly to **their** hardware or software. For example, suppose you are having trouble connecting to the Internet, so you call your local Internet provider. If their service is not causing the problem, you are stuck. Maybe your firewall is not configured right. Maybe the data cable is not connected properly. If your problem is even partially related to another software or piece of hardware on your system, they will not help you.

2. Computer support hotline services:

These services work like prepaid calling cards. For a set fee, you will get a toll-free number to call for 24/7 technical support. Sounds reasonable, but it is not all it is cracked up to be.

If you are a home user with simple application problems and questions, this service may work well for

you. However, if you are a business with mission-critical data, the last thing you want is a junior technician giving you advice over the phone from another country. Also, some problems simply need to be analyzed on-site. Finally, these services are set up to deliver **basic** computer support, not to troubleshoot server problems, help with data recovery, or provide proactive maintenance.

3. The part-time technician just getting started:

This is usually someone who left a job in the IT department of a company, was fired, or lost a job due to downsizing. Either way, he decided to start his own business with the dream of making lots of money by providing computer support to small businesses.

In many cases, he will try to do a good job for you. He means well, will often work cheap, and is usually eager to please. He might even have been referred to you by a friend or business colleague.

Although he has every intention of providing you with a good service and fast responses, there are some things you need to consider before hiring him to work on your computer network. Since most of these folks work from home, they do not have a secretary or office staff to handle your requests. When you call, you will either get:

- An answering machine.
- A spouse, friend, or child who will take a message (which might or might not reach the technician).
- No answer and no voice mail, the phone just keeps ringing.
- The technician on his cell phone and he is usually at another client's site, in his car, or taking care of some personal business (you catch him at the doctor's office or in a noisy restaurant).

The problem with this choice is response time; if you have a major network crisis, you need to know that you can get in touch with your consultant AND get a call back or response immediately. But, it does not end there ...

Another problem you will encounter is availability; the technician might not always be around when you need him. What happens if he leaves town for a week or has to go to the hospital? Or, two or more of his clients experience a major emergency at the same time? Or, the going gets tough and he decides to take another job? These are all scenarios that happen frequently with computer technicians who have not established best practices and systems in their businesses. And, if he is only supporting your network in

his off time, you can bet your emergency is going to take a back seat to his full-time employer.

Guaranteeing his work is another problem for the part-timer. Most do not have a professional contract, proposal, or invoice to give you, which means you have no written paperwork or contractual agreements to fall back on if things go wrong. Plus, most do not carry Errors and Omissions insurance and cannot compensate you if they accidentally screw up your network or cause you to lose data.

Even if he guarantees his work, how do you know he will be around to fulfill his promises? Addresses and phone numbers can be changed instantly, and your one-man-wonder can disappear, leaving you no recourse or recovery.

4. The “major player” tech-support company:

This vendor is the complete opposite of the one-man-band. They may have multiple technicians, multiple locations, and a support crew. They might even have locations across the globe. There are many first-rate computer-support companies in this category that can be trusted to do a good job for you. As a matter of fact, many have the staff and resources to do an outstanding job.

So what is the problem? Their schedule, price, and availability! In many cases, these companies are so busy servicing a number of large, profitable clients that they might not give a small-business owner the service, response time, and support you want. They also may charge you exorbitant fees to cover their massive overhead of staff and offices. If you own a big business, with a big IT budget, you will do just fine with this type of company. However, if you own a small or medium business with a conservative IT budget, this may not be the best option for you.

Since you do not represent a large windfall of profits for them, big tech-support companies may delegate their junior technicians, who are just learning the ropes, to support your network, saving the experienced consultants for their more profitable clients. As a business owner yourself, you can hardly blame them for taking this approach but, as a customer, you do not want to be the small fish who is easily brushed aside.

Just like the big vendors, the larger the tech-support companies get, the less personalized the service becomes. You may not always get the same consultant working on your network, and you might not be able to talk directly with a consultant when you call. Being part of a large franchise does not guarantee great service

either; it just means they were able to write a check to cover the franchise costs. That does not automatically buy them good business sense, technical skills and/or customer-focused service.

5. An independently-owned computer consulting firm:

You might accuse me of being biased here, since this describes me, but please give me a minute to explain my position before you dismiss my advice.

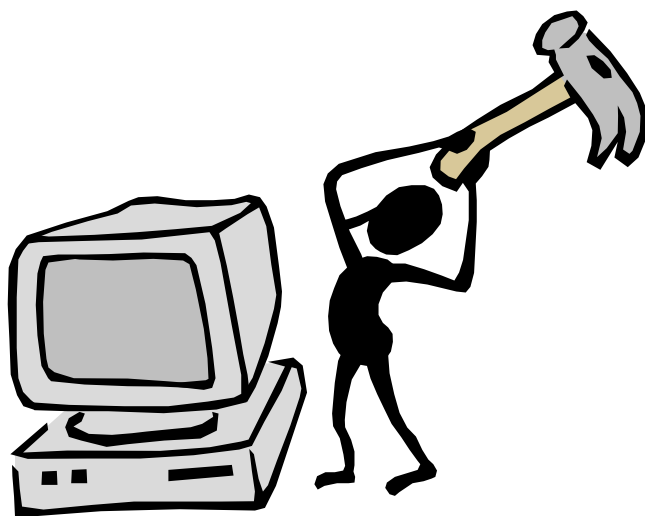
First of all, I have been doing business in this industry for over 15 years, so I have considerable experience working with, and talking to, hundreds of other small-business computer consultants. I have seen the horror stories and heard the complaints business owners have with all technology service vendors. Based on that experience, I think the best option for a small business is an independent consulting firm that is locally owned and operated.

The business you choose to support your network should be large enough to provide back-up support and fast response times, but small enough to provide personal service. That is the way we have modeled our company, and we have been able to deliver consistent, professional services for a number of years now.

We certainly do not feel as though our model of independently-owned consulting firm is the sole option you can choose, and the size of a company is certainly not the only way to know in advance how professional and competent they will be.

The remainder of this book will further outline what to look for when choosing a computer consultant for your business.

Quick Tip: A good consultant will act as your virtual CIO (Chief Information Officer) whose opinions should command the same respect as any other “C” level executive.



Chapter Seven

Why You Need Managed Services

The computers in your office and the network they serve are, without a doubt, the single most important tools you use on a daily basis to run your business. Your computer network is at the core of your communications, operations, accounting, client-care, and marketing. Just try to imagine one task or operation in your business that does not, directly or indirectly, depend on the security and availability of your computer network.

Yet, as important as your network is to your business, very few small-business owners take the necessary steps to ensure that it runs as smoothly and efficiently as possible. This is a huge, costly mistake.

With the constant changes to technology and daily development of new threats, even small peer-to-peer computer networks need ongoing maintenance and security updates from a highly trained consultant.

Unfortunately, what we see most business owners doing is ignoring regular maintenance and only calling a consultant when the network becomes inoperable. This reactive model of upkeep is a surefire path to extensive downtime, lost data and spending more on IT support, not to mention major disruptions in worker productivity, sales, cash flow, production, and customer service that can never be recovered.

How Managed Services Can Prevent These Disasters From Happening To Your Business

Thanks to advances in technology, your computer consultant can now provide ongoing remote maintenance and support to maximize the performance, reliability, and stability of your network. The industry term for this is “**managed services**”, although your consultant might have a different name for it.

The basic premise is this: For a fixed monthly fee, your computer consultant will take over the responsibility of performing regularly scheduled maintenance on your network to ensure that your virus protection and security patches are up-to-date, your backups are working properly, your firewall and other security settings are actively protecting you, the speed and performance of your network are maximized, and

all the components of your network are functioning properly.

In essence, they are taking over the tactical, day-to-day maintenance and support of your network for a fraction of the cost of hiring a full-time consultant.

What Are The Benefits Of Managed Services?

Service calls to computer networks not under a managed-service plan (MSP) require two to three times as long to diagnose and repair as systems that are under a MSP, because the technician's unfamiliarity with the network requires additional time for diagnostics and testing. This naturally leads to higher repair bills and more downtime.

In addition to the added expense and hours required for these repairs, some of the damage to your network can be irreversible, and could have been easily prevented with a solid MSP.

If the data and operation of your network is important to your business, you need to make sure you are taking the necessary steps to ensure its safety and security. A good managed-service plan will provide the following benefits:

- **You will practically eliminate expensive repairs and data recovery costs.** By detecting and preventing network disasters

before they happen, a good MSP will save you thousands of dollars in repairs and downtime.

- **You will receive faster support.** Thanks to remote-monitoring and maintenance software, your consultant will be able to securely access and repair most network problems right over the Internet. No more waiting around for an engineer to show up or paying for travel fees.
- **You will experience faster performance, fewer problems and practically zero downtime.** Some components of your network will degrade in performance over time, causing it to slow down, hang up, and crash. The regular preventive maintenance offered through an MSP will make sure your computers stay in tip-top shape for maximum speed, performance, and reliability.
- **You will get top-level IT support without the costs and overhead of hiring a full-time IT manager.** A junior technician can easily cost your company \$45,000-50,000 a year in salary, taxes, and insurance, and a senior consultant could cost two to three times that amount. Under an MSP, you get to share a senior consultant with other businesses,

which greatly reduces your costs without sacrificing experience or quality of work.

- **You will receive discounts on new projects and better service.** Most computer consultants will offer priority service and a discount to clients on their managed-service plan. Plus, your consultant will become more familiar with your hardware, software, settings, and history, and therefore provide faster service than the consultant who has to spend time “feeling around” your network.
- **You can budget for IT support just like rent or insurance.** If your IT support bill varies from month to month, a managed-service plan will help even it out and make budgeting easier. Just make sure the plan you sign up for is all-inclusive, with no hidden charges, caveats, or fees.
- **You will safeguard your data.** The data on the hard disk is always more important than the hardware that houses it. If you rely on your computer system for daily operations, it is time to get serious about protecting your critical, irreplaceable electronic information. A good MSP will greatly reduce your chances of losing critical company data, files, and information.

- **You will gain peace of mind.** As a business owner, you already have enough to worry about; the last thing you need is a computer crisis. Having a managed-service plan in place takes that worry off your plate.

What To Look For In A Managed-Service Plan

There are a number of factors to look for in a MSP. A good consultant will take time to sit down with you and explain your options, based on your priorities, budget, network complexity, support needed, and conditions of satisfaction. However, here are a few things to make sure your consultant includes in your agreement:

- **Security Patches and Updates.** Software vendors frequently issue critical patches to cover known security loopholes in their software. However, not all patches are trouble-free, and some will require specialized knowledge to install. On many occasions, Microsoft has distributed patches that come with fine-print instructions warning the user to install and test the patch on one machine before rolling it out to all the computers on the network. Since most people don't read the

fine print on a software download, or are simply not aware of the problems that can arise from installing an untested patch, they blindly install it on their entire network only to discover that it caused a number of software conflicts and system failures. That is why it makes sense to allow a trained professional to manage and install patches on a regular basis. Trying to do this on your own is similar to playing Russian roulette with your network.

- **24/7/365 Monitoring and Alerts.** Your consultant should be able to provide around-the-clock monitoring for your network to look for problems developing under the radar. He should also notify you of problems in advance so that preventive action can be taken.
- **Spam Filtering.** Not only is spam annoying, it is the number-one way viruses enter a computer network.
- **Virus Updates.** Unless you have been living under a rock, you know that viruses are a real, and very dangerous, threat to your computer network. Since new viruses launch daily, you need to make sure your consultant is also monitoring your virus protection, and automatically updating

your network with new virus definitions as soon as they become available. **Note:** Your consultant will often recommend virus software for you to purchase; it is not normally included in a MSP.

- **Spyware Scanning and Removal.** Like viruses, spyware can cause a number of problems for your network and may even result in identity theft. Symptoms of spyware include excessive pop-up ads, sluggish performance, and strange Web browsers opening on your computer that you did not request.
- **System Backup Monitoring.** Your consultant should monitor your daily system backups to make sure they are working properly, and perform a regular (monthly or quarterly) test restore to make sure your data is available in a usable format. Tape backups are notorious for failing. Even if they appear to be working, the data could be corrupt and useless. We have seen several situations where a company thought their data was secure only to find out that it was not when they desperately needed it. Some consultants will even offer an off-site data backup solution.

- **Vendor Liaison.** Quite often, software or hardware will just fail. It is far more convenient to have a consultant who is familiar with your network to deal with the warranty returns and replacements of those parts with the manufacturer, rather than deal with it yourself. If you have ever had to call the “customer service” hotline of a technology vendor, you know what a headache it can be. Other vendors include practice-management software, Internet providers, Web-hosting companies, and so on. For convenience, have your consultant agree to be your vendor liaison with these companies so you do not have the hassle.
- **Creation of Acceptable-Use Policies and Training.** An acceptable-use policy is simply the rulebook for what your employees can and cannot do with their computers. Uneducated employees can accidentally introduce spyware, viruses, hackers and other major problems into your network. They can also use their work computer and e-mail to access and share unacceptable material. All it takes is one employee to send an off-color joke to a list of friends from your company’s e-mail to start problems for you. In some cases,

employees' actions can bring expensive and embarrassing lawsuits against your company. Talk to your consultant about ways to educate and enforce an acceptable-use policy.

- **Adding and Removing Hardware and Software.** You just purchased a new printer and you are eager to start using it. However, you cannot figure out why you keep getting error messages and why you cannot print from Excel. If you had a managed-service contract that covered hardware and software installation, your consultant would be responsible for making sure it was installed and configured properly, and you wouldn't have to waste one minute dealing with these problems.
- **Adding and Removing Users.** Although this seems like a simple thing, user access to your network is a critical security risk that needs to be managed properly to avoid disgruntled employees or unauthorized persons accessing it. This is especially true if you have remote workers.
- **Help Desk Support.** This would include a mix of phone, remote and on-site support for you and your employees to answer any number of technical questions and

problems. Remember, phone support is not free; calling your consultant for a “quick” question is a billable event and can cost you \$50-150. Therefore, you want to have some level of remote and on-site support included in your managed-service contract.

- **Loaner Equipment.** When you have a piece of equipment fail, you need it back online as soon as possible. A Platinum Agreement will provide a loaner equivalent piece of equipment to keep you operational while yours goes back to the shop for repair.
- **Line of Business Software.** You probably have primary software that you use to run your business. In a medical office, this would be Practice Management software and EMR software. In an attorney’s office, this would be the time and billing software. This is generally purchased from a 3rd party and supported by the selling vendor, but, a good consultant will work with the vendor to get any regularly scheduled updates done for you, generally in the off hours so as not to adversely affect your business.

Keep in mind that this is just a starter list of services to look for. The size and complexity of your network, the security required, and the software and

systems you use will largely determine the type of ongoing support you need. A good computer consultant will take time to understand your needs and offer multiple plans to choose from. He will also be flexible and allow you to upgrade or downgrade the level of support provided if you discover that your plan is not meeting your needs.



Chapter Eight

Disaster Recovery or Backup

Backup is the act of copying your data, files and databases to another medium so that they will be protected and can be recovered from in the event of a catastrophe or equipment failure. Normally, this term is associated with Tape Backups.

Disaster Recovery is a plan for duplicating computer operations after a catastrophe occurs, such as a hurricane, fire, tornado, or earthquake. It includes routine off-site backup as well as a procedure for activating vital information systems in a new location.

Everyone who has a computer with files that they cannot live without needs, at minimum, a backup solution. These solutions come in the form of tape drives, external hard drives and sometimes an Internet based vendor.

If your business needs its servers and computers to continue delivering service to your customers and if it would paralyze your business to be without computers for a day or two while your server

was being repaired and recovered from tape, then you must have Disaster Recovery.

A good Disaster Recovery plan has the following elements:

- Onsite backup server
- Onsite snapshot backups
- Onsite virtualization
- Onsite backup storage
- Offsite virtualization
- Offsite storage
- Single monthly fee that covers all services
- Loaner equipment
- Single file recovery
- Email and SQL database backups and recovery

Tape backups have been in use for years and if tested regularly, and if you are not concerned with how quickly you can recover, they are a reasonable way to protect your business. The problem with tape backups is that most folks do not test them monthly or quarterly to insure that the data can be recovered. If the recovery process is not regularly tested to make sure you can get your data back, then you are at risk. And risk is not a term we want to associate with recovery.

On the other hand, Disaster Recovery using modern technology combined with an offsite Data Center is the ultimate best way to protect and recover

your business. Backups are made to an onsite server every hour, the backups are turned into Virtual Machines (VMs), which are immediately tested to make sure they can be successfully used, and then the VMs are transported to the Data Center via the Internet.

In the event of a recovery,

- you can use the onsite VM to restore to your physical server
- You can use the onsite VM in place of your failed server
- You can use the Data Center VM in place of your server if your office is destroyed

You can recover from fire, theft, vandalism, and natural disaster and you can do it from your office or the Data Center without the fear of lost data or records. This is true Disaster Recovery.



Chapter Nine

Questions To Ask Before You Hire A Computer Consultant

Customer Service:

Q1: Do they have a web based trouble ticket system that gives you immediate response or do you always have to leave a voice mail and wait for someone to call you back?

Any reputable computer consultant will have a web-based trouble ticket system that allows a client to create a trouble ticket 24/7/365. During normal working hours, you should get an immediate response via telephone or email that acknowledges your problem and starts the resolution process. After hours, you should get a response based on your Service Level Agreement (SLA). Additionally, the firm should give all clients an emergency after hours number they may call if a problem arises, including weekends. Why? Because many CEOs and executives work outside normal hours and find it to be the most productive time they have. If they cannot access their computer network AND cannot

get hold of anyone to help them, it is incredibly frustrating.

Q2: Do they have a written, guaranteed response time to your calls?

Your computer consultant must guarantee to have a technician working on your problem within a certain time frame after you call, generally within the hour, during normal business hours. If they cannot guarantee a certain response time, then be prepared to work on their time frame and not yours when a problem does arise. A written guaranteed response time should be standard in every service agreement you sign.

Q3: Do they take the time to explain what they are doing and answer your questions in terms that you can understand (not geek-speak), or do they come across arrogant and make you feel stupid for asking simple questions?

Good technicians are trained to have the “heart of a teacher” and will take time to answer your questions and explain everything in simple terms using “word pictures” and analogies.

Q4: Do they consistently (and proactively) offer new ways to improve your network’s performance, or do they wait until you have a problem to make recommendations?

Your computer consultant should routinely conduct quarterly review meetings with you to look for new ways to help improve their operations, lower costs, increase efficiencies, and resolve any problems that may be arising. Their goal should be to help you be more profitable, efficient, and competitive with these meetings.

Q5: Do they provide detailed invoices that clearly explain what you are paying for?

Do you hate it when your computer service company sends you a bill and you have no idea what work was done? This is completely unacceptable behavior. You should demand that your computer consultant provide you with detailed invoices that show what work was done, why and when so you never have to guess what you are paying for.

Q6: Do they have adequate Errors and Omissions (E&O) insurance as well as Workers Compensation insurance to protect YOU?

Here is something to consider: if THEY cause a problem with your network that causes you to be down for hours or days or to lose data, who is responsible? Here is another question to consider: if one of their technicians gets hurt at your office, who is paying? In this litigious society we live in, you better make darn sure whomever you hire is adequately insured with both Errors and

Omissions insurance AND Worker's Compensation – and don't be shy about asking to see their latest insurance policies!

True Story: A few years ago, Best Buy's Geek Squad was slapped with multi-million dollar lawsuits from customers for bad behavior of their technicians. In some cases, their techs were accessing, copying and distributing personal information they gained access to on customers PCs and laptops brought in for repairs. In another case they lost a client's laptop (and subsequently all the data on it) and tried to cover it up. Bottom line; make sure the company you are hiring has proper insurance to protect YOU.

Q7: Do they guarantee to complete projects on time and on budget?

All projects should be a fixed priced and guaranteed to be completed on time, in writing. This is important because many unethical or incompetent computer guys will only quote "time and materials", which gives them free reign to nickle and dime you as well as take as much time as needed on completing a project.

Maintenance of Your Network:

Q8: Do they insist on remotely monitoring your network 24/7/365 to keep critical security settings, virus definitions, and security patches up-to-date and

PREVENT problems from turning into downtime, viruses, lost data and other issues?

A remote network monitoring system watches over your network to constantly look for developing problems, security issues and other problems so your computer consultant can address them BEFORE they turn into bigger problems and network downtime.

Q9: Do they provide you with a regular report that shows all the updates, security patches, and status of every machine on your network so you know for SURE your systems have been secured and updated?

Demand a detailed regular report that shows an overall health score of your network and the updates to your antivirus, security settings, patches and other important network checks (like hard drive space, backups, speed and performance, etc.). Even if you do not read through the report every week, it is important to know that this is happening.

Q10: Is it standard procedure for them to provide you with written, network documentation detailing what software licenses you own, critical passwords, user information, hardware inventory, etc., or are they the only person with the “keys to the kingdom?”

Every business should have this in written and electronic form at no additional cost. Your computer

consultant should also perform a quarterly update on this material and make sure certain key people from your organization have this information and know how to use it, giving you complete control over your network.

Side Note: You should NEVER allow an IT person to have that much control over you and your company. If you get the sneaking suspicion that your current IT person is keeping this under their control as a means of job security, get rid of them. This is downright unethical and dangerous to your organization, so do not tolerate it!

Q11: Do they have other technicians on staff who are familiar with your network in case your regular technician goes on vacation or gets sick?

Since they are keeping detailed network documentation and updates on your account, any of their technicians should be able to pick up where another one has left off.

Q12: When they offer an “all-inclusive” support plan, is it TRULY all-inclusive, or are their “gotchas” hidden in the fine print?

One of the more popular service plans offered by consulting firms today is an “all-inclusive” or “all-you-can-eat” managed services plan. These are actually a good thing because they’ll save you a lot of money in

the long run – HOWEVER, make sure you REALLY understand what is and isn't included. Some things to consider are:

- Is phone/e-mail help desk included, or extra?
- What about network upgrades, moves, or adding/removing users?
- Is hardware and/or software included?
- What about 3rd party software support? (We recommend that this IS included).
- What are the costs/consequences of early cancellation?
- What if you are not happy with their services? Do they offer a money-back guarantee?
- If the hardware and software is included, what happens if you cancel the contract?
- Are offsite backups included? To what degree?
- If you have a major disaster, is restoring your network included or extra?
- What about onsite support calls?
- Is support to remote offices?
- Are home PCs used to access the company's network after hours included or extra?

Backups and Disaster Recovery:

Q13: Do they INSIST on monitoring and offsite, as well as an onsite, backup or are they letting you rely on outdated tape backups?

I would never recommend any business these days to use tape backups because they are just so incredibly unreliable. A solution that uses an on premise server with image based (snapshot) backups is the preferred method of Disaster Recovery. The program should then virtualize those snapshot backups, so that in the event of a disaster, the virtual machine can be mounted and the client can immediately return to work while the physical server is being repaired. The Disaster Recovery solution should then ship the Virtual Machine offsite to a secure Data Center using government level encryption.

Q14: Do they INSIST on doing periodic test restores of your backups to make sure the data is not corrupt and could be restored in the event of a disaster?

Your computer consultant should perform a regular “fire drill” and perform a test restore from backup to make sure your data CAN be recovered in the event of an emergency. After all, the WORST time to “test” a backup is when you desperately need it.

Q15: Do they insist on backing up your network BEFORE performing any type of project or upgrade?

This is a simple precaution in case a hardware failure or software glitch causes a major problem.

Q16: If you were to experience a major disaster, do they have a written plan for how your data can be restored FAST and/or enable you to work from a remote location?

At minimum, you should have a simple disaster recovery plan for your data and network. I would also encourage you to do a full disaster recovery plan for your office, but at least your computer network will be covered should something happen.

Technical Expertise and Support:**Q17: Is their help-desk US based or outsourced to an overseas company or third party?**

A U.S. based, in-house help Vendor desk helps ensures the folks helping you are friendly and helpful. We consider this one of the most important aspects of customer service, plus we feel it is important to keeping your data secure.

Q18: Does their company maintain current vendor certifications and participate in on-going training – or are they learning on your dime?

Any company working on your network should be up to date on the vendor certifications on your network (i.e. Microsoft, Cisco, etc.). Our experience is that the vast majority of technicians out there these days are woefully undertrained.

Q19: Do their technicians arrive on time and dress professionally?

Any technicians working on your network is a part of your staff while they are there. Are the technicians you are used to dealing with true professionals that you would be proud to have in your office? Do they dress professionally and show up on time?

Q20: Are they familiar with (and can they support) your unique line of business applications?

Any computer consultant should own the problems with all of your line of business applications. That does not necessarily mean that they can fix faulty software – but they SHOULD be the liaison between you and your vendor to resolve problems you are having and make sure these applications work smoothly for you.

Q21: When something goes wrong with your Internet service, phone systems, printers, or other IT services, do they own the problem or do they say, “That’s not our problem to fix?”

Your computer consultant should own the problem so that you do not have to try and resolve any of these issues on your own – that is just plain old good service and something many computer guys will not do.

Quick Tip: Today's full-time, professional consultants will offer a variety of services bundled into a single "Platinum" offering. For most businesses, selecting this high-end plan is the most cost effective way to rid yourself of computer headaches once and for all.



Chapter Ten

Negotiating a Win-Win Deal

Now that we have defined what to look for in qualified, competent, honest consultants, it makes sense to tell you how to get the most out of your relationship with them.

A great computer consultant will free you from worrying about data loss, downtime or other problems, allowing you to focus on the more important, strategic aspects of running and growing your business. It will also free your staff from trying to be jacks-of-all-trades and wasting time on activities they are not particularly good at, which also distracts them from doing their regular job. And ultimately, the consultant will recommend products and solutions to help your business operate more competitively, increase sales and lower your workload and stress levels.

But, that is not to say you are completely off the hook.

There are a number of ways you can undo everything your consultant has done for you and severely jeopardize the security and reliability of your network. Plus, you are ultimately responsible for making sure your consultant understands your business priorities, goals, and operational systems so he can offer advice and solutions to support you.

Once you understand your role and responsibilities for maximizing your technology investments, and what your consultant is and is not responsible for, you will have a much better working relationship with him and prevent most unpleasant surprises and expensive misunderstandings.

Take Responsibility For Your Own Protection

Many business owners automatically blame their computer or their consultant when they experience a problem, get infected with a virus, or realize their network has been taken over by spyware. And, in some cases, these problems *are* due to negligence by your consultant.

However, most spyware and virus attacks are the result of an end-user downloading a questionable file or program, disabling their antivirus software, or somehow circumventing security settings or acceptable-use

policies set by your consultant (such as visiting a peer-to-peer file-sharing network).

Many other problems are due to hardware or software inadequacies that cannot be controlled or prevented by your consultant.

Finally, many business owners do not want to pay their consultants to perform simple preventive maintenance, update security patches and virus definitions, or monitor their system's performance. This lack of maintenance is an invitation for problems that cannot be blamed on your computer consultant.

Unless your consultant has *complete* control over your network and has been given the responsibility to monitor and maintain your network 24/7/365, chances are that your problems were not caused directly by some action he took (or did not take). Again, that is not to say that you are completely at fault for all network problems, but you and your employees need to take an active role in keeping your network and data safe from harm.

Keep Spyware, Malware, and Viruses Off Your Network

In almost every case, malware, spyware, and viruses are able to invade a network because of some action taken by a user. Cybercriminals are *incredibly clever* and

have figured out ways to access your computer network through some of the most innocent and common activities you perform daily.

For example, many of the clients we see infected with spyware simply downloaded a screen saver, an “enhanced” Web browser, a music file, or some other “cute” program. In doing so, they also unknowingly downloaded a number of spyware and malware programs. Within a short time, they could no longer use their computer because of its slowness, instability, and pop-ups. Your consultant can usually clean up the mess caused by these programs, but it is your responsibility to become educated about what you can and cannot download. Below is a short list of programs and Websites you should never download or visit. Your consultant should be able to provide you with a more comprehensive, up-to-date list:

- Screen savers.
- “Enhanced” Web browsers like Cool Search.
- Emoticons.
- Games.
- Peer-to-peer file-sharing software.
- Music files.
- “For fun” surveys (what type of person are you?).

- Banners that challenge you to “punch the monkey”, shoot something or answer a trivia question to win a prize.
- Sweepstakes or drawings.
- Any software that requires you to accept certain conditions; by agreeing to their conditions, usually outlined in small print, you are agreeing to accept third-party software.

Unfortunately, installing the above programs is not the only way a hacker or malware program can access your computer network. If you do not have the most up-to-date security patches and virus definitions installed, wrongdoers can access your computer through a banner ad or an e-mail attachment.

Quick Tip: Your computer network is not a place for your staff to play or conduct their personal affairs. Implement Internet browsing rules and stick with them.

Be Aware Of Sneaky Ways Hackers Invade Your Network

A while back, Microsoft released a security bulletin about three newly discovered vulnerabilities that could allow an attacker to gain control of your computer by tricking you into downloading and opening a maliciously crafted picture. At the same time, Microsoft released a

Windows update to correct the vulnerabilities. But, if you did not have a process to ensure that you were applying critical updates as soon as they became available, you were completely vulnerable to this attack.

Here is another compelling reason to ensure your network stays up-to-date on the latest security patches: Most hackers do not discover these security loopholes on their own. Instead, they learn about them when Microsoft, or any other software vendor for that matter, announces the vulnerability, and issues an update. That is the hackers' cue to spring into action; they immediately analyze the update and craft an exploit (like a virus) that allows them access to any computer or network that has not yet installed the security patch. The time between the release of the update and the release of the exploit that targets the underlying vulnerability is getting shorter every day.

When the "nimda" worm was first "discovered" in the fall of 2001, Microsoft had released the patch that protected against that vulnerability *331 days before*. Therefore, network administrators had plenty of time to apply the update. Of course, many still had not done so, and the nimda worm caused lots of damage. These days' reports have shown that hackers can exploit vulnerabilities in less than a day, providing further proof

that computer patches must be installed much more regularly than ever before.

Clearly, *someone* needs to be paying close attention to your systems to ensure that critical updates are applied as soon as possible. That is why we highly recommend that small-business owners without a full-time IT staff allow their consultant to monitor and maintain their network.

Create and Enforce An Acceptable-Use Policy (AUP)

An AUP is a written document stating exactly what your employees can and cannot do with company Internet access, computers, and e-mail. For example, employees should not be allowed to download or access programs, screen savers, pictures, music files or file-sharing networks. This will save precious bandwidth and prevent downloading viruses and spyware. An AUP should also educate employees on the appropriate use of your company's resources.

If you do not want your staff to download pornographic material and send racist jokes through a company e-mail account, you have to communicate this information to them in an acceptable-use policy and have them acknowledge *in writing* that they have read and understood it. Your consultant can help you draft this document and enforce the policies outlined.

Allow Your Consultant To Maintain Your Network

As we mentioned previously, many business owners do NOT perform regular maintenance on their computer network; they use the network until it stops working, and then bring in their consultant.

While this arrangement may seem to work just fine in the short-term, it can dramatically increase problems and the costs of keeping your network running. Then there is the threat of experiencing a major network disaster. Unfortunately, most businesses have to experience some type of catastrophe before they get serious about maintaining their network. Just ask any business owner about the importance of a solid backup or keeping their security up-to-date after they have gone through the devastation of losing a week's worth of work.

Look at these alarming statistics:

- Approximately **20%** of all small and medium-sized businesses endure a major network disaster **every five years**.
- The U.S. National Fire Protection Agency predicts that **43%** of companies that experience these disasters will never reopen, and another **29%** will close within three years.

- If the loss involves data, the diagnosis is even worse. According to the U.S. Bureau of Labor, **93%** of companies that suffer a significant data loss are out of business within five years.
- Kaspersky Labs reports that they are detecting 200,000 new malicious programs **every day**.
- The Internet Storm Center, which tracks security attacks, reports **7.6 million attacks** in the U.S. alone.

If you really want to protect yourself from data loss, viruses, spyware, hackers, downtime and a host of other problems, the best thing you can do is find a computer consultant that offers 24/7/365 monitoring and maintenance for your network and then let them do it for you. By allowing your consultant to control, manage and maintain your network, the chances of experiencing significant problems is greatly reduced.

Be A Great Client

There is a lot of truth in the cliché, “You’ll attract more bees with honey than vinegar”. This is especially true when working with professional consultants.

Quite often, business owners take an adversarial approach to working with their vendors. Since they are

paying the bills, they believe that they have the right to be demanding, difficult, and even hostile. What they do not realize is that vendor relationships can make or break a company, and maintaining a good working partnership with your computer consultant is critical to your business success.

The more respect and appreciation you give your consultant, the more he will want to do a great job for you. Keep in mind that you might need him to do you a favor, or pull you out of a big mess, somewhere down the road. If you have developed a good working relationship based on mutual trust and appreciation, he will be far more willing to go the extra mile and help you out when you need it most.

Here are three ways to make sure you become a “favorite” client who receives special favors and extra attention:

1. Pay all bills on time or early.
2. Express your gratitude for the work he has done. Everyone likes to know that his or her efforts are appreciated.
3. If you have a complaint, do not jump to the conclusion that your consultant was trying to harm you on purpose. Let him know about your complaint and give him a chance to make it right before you get

angry or take action. It may have been a simple mistake, or even an oversight, on *your* part.

Overall, clear communication is your best tool to ensure a great working relationship with your computer consultant. You want to find someone you can partner with long-term who will take an active role in making your business profitable and successful. That requires mutual respect on both sides.

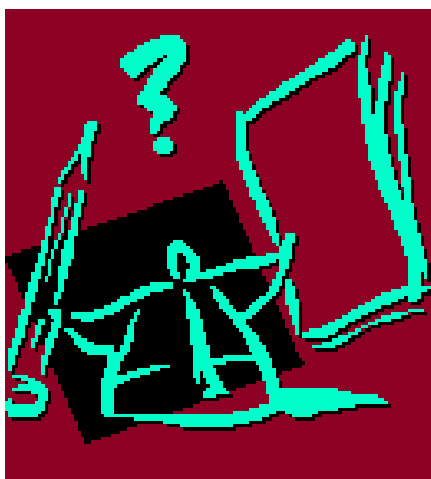
Six Ways A Good Relationship With A Competent Computer Consultant Benefits Your Company

1. The consultant proactively monitors and maintains your network to prevent problems from happening, which gives you peace of mind by knowing that the “gremlins at the gate” are being watched and kept at bay.
2. The consultant is familiar with your network and therefore can troubleshoot problems faster.
3. He understands your business and can recommend ways to save money, increase productivity, and reduce mistakes.
4. He helps lay a foundation for growing your business.

5. He knows about any software or hardware that has been added to your network (which are frequently the source of a problem).
6. He sorts through all the new technology, threats and news, and only informs you of the things you need to know.

Your Computer Consultant is Your “Virtual” CIO

If you treat your consultant as the “hired help”, you will get an entirely different result than if you treat him as a member of your management team. Your consultant is an important part of the decision making process involved in running your business. While he may not physically be there daily, he is ever vigilant watching over the equipment that allows you to be successful. The consultant is your “Virtual” CIO (Chief Information Officer) and his input and opinions should be regarded as highly any other “C” level executive in your firm. If you have picked the right consultant and engage him in the technology decision-making process, you will rarely have any technology related issues. And for the issues that do appear, your consultant will step up to the plate and own those issues because he was instrumental in their creation.



Chapter Eleven

Technical Terms Explained in Plain English

ASP: *Application Service Provider*, a third-party company that manages and distributes software-based services and solutions to their customers over a wide-area network, usually the Internet.

Blackberry Enterprise Server (BES): A software and service that connects to messaging and collaboration software (Microsoft Exchange, Lotus Domino, Novell GroupWise) on enterprise networks and redirects emails and synchronizes contacts and calendaring information between servers, workstations and BlackBerry mobile devices.

Cloud Computing: Internet based computing, whereby shared resources, software, and information are provided to computers and other devices on demand, as with the electricity grid.

Content Filtering: Software that prevents users from accessing or sending objectionable content via your network. Although this usually refers to Web

content, many programs also screen inbound and outbound e-mails for offensive and confidential information. This software is not designed for virus, worm, or hacker prevention.

CPU: *Central Processing Unit*, the brains of a computer.

DHCP: *Dynamic Host Configuration Protocol*, a method for dynamically assigning IP addresses to devices on request, rather than explicitly programming an IP address into each device. If you have a server on your network, configuring that server as a DHCP server will make it much easier to add or reconfigure individual workstations on the network.

Default Gateway: In a TCP/IP network, this is the gateway that computers on that network use to send data to, and receive it from, computers and networks outside of the local network. Typically, this is the router or firewall that connects the local network to the public Internet, although it might also be a router that connects to another remote server or computer within the same company.

DMZ: *Demilitarized Zone*, a separate area of your network that is isolated from both the Internet and your protected internal network. A DMZ is usually created by your firewall to provide a location for devices such as

Web servers that you want to be accessible from the public Internet.

DNS: *Domain Name System* (or *Server*), an Internet service that translates domain names into IP addresses. Even though most domain names are alphabetic, hardware devices (like your PC) can only send data to a specific IP address. When you type www.microsoft.com into your Web browser, or send an e-mail message to someone@business.com, your Web browser, and e-mail server have to be able to look up the IP address that corresponds to the microsoft.com Web server, or to the mail server that receives e-mail for business.com. DNS is the mechanism for doing this lookup.

DSL: *Digital Subscriber Line*, a high-speed Internet service delivered over a telephone line.

Firewall: A device or software program designed to protect your network from unauthorized access over the Internet. It may also provide Network Address Translation (NAT) and Virtual Private Network (VPN) functionality.

Fractional T-1: One or more channels of a T-1 service. A complete T-1 carrier contains 24 channels, each of which provides 64 Kbps. Most phone companies also sell fractional T-1 lines, which provide less bandwidth but are less expensive. See T-1.

Hosted Applications (i.e. Hosted SharePoint or Hosted Exchange): A service whereby a provider makes a software (i.e. email) and space available on a server so its clients can host their data on that server.

IP Address: An identifier for a computer or device on a TCP/IP network. The format for an IP address is a 32-bit numeric address separated by periods (example: 207.46.20.60). Within an isolated network, you can assign an IP address at random, as long as each IP address on that network is unique. However, if you are connecting a network or computer to the Internet, you must have a registered IP address (also called an Internet address) to avoid duplicates.

POP3: *Post Office Protocol 3*, a method of communication between an e-mail server and an e-mail client. In most cases, when the client software connects to a POP3 server, the e-mail messages are downloaded to the client and are no longer available on the server.

T-1: A dedicated digital transmission line that sends and receives data at a rate of 1.544 Mbps. T-1 lines can be used to carry voice traffic, data traffic or a combination of both.

TCP/IP: *Transmission Control Protocol/Internet Protocol*, the basic language that governs traffic on the global Internet, as well as on most private networks.

URL: *Uniform Resource Locator*, the global address of documents, Websites and other resources on the Web.

VoIP: *Voice-Over-IP*, a category of hardware and software that allows you to use the Internet to make phone calls and send faxes. This technology is becoming very popular with businesses and home users alike because it greatly reduces telephone costs.

VPN: *Virtual Private Network*, a network constructed by using public wires (the Internet) to connect nodes (usually computers and servers). A VPN uses encryption and other security mechanisms to ensure that only authorized users can access the network and the data it holds. This allows businesses to connect to other servers and computers located in remote offices, from home, or while traveling.

An Invitation to the Reader

The reason I published this book was to fortify business owners with the basic knowledge they need to make a great decision when choosing a computer consultant. I believe a qualified computer consultant can contribute to your business success just like a great marketing consultant, attorney, accountant, or financial advisor.

The technology industry is so new, and growing at such a rapid pace, that most business owners cannot keep up with all the latest whiz-bang gadgets, alphabet soup acronyms, and choices available to them. Plus, many of the “latest and greatest” technological developments have a shelf life of six months before they become obsolete or completely out-of-date. Sorting through this rapidly moving mess of information to formulate an intelligent plan for growing a business requires a professional who not only understands technology and how it works, but also understands how people and businesses need to work with technology for progress.

Unfortunately, the complexity of technology makes it easy for a business owner to fall victim to an incompetent or dishonest computer consultant. When this happens, it creates feelings of mistrust toward all technology consultants and vendors, which makes it

difficult for those of us striving to deliver exceptional value and service to our clients.

Therefore, my purpose is to not only give you the information you need to find an honest, competent computer consultant, but in doing so, to raise the standards and quality of services for all consultants in my industry. I believe that, the more this topic is discussed, the better it will become for all involved.

I certainly want your feedback on the ideas in this book. If you try the strategies I have outlined and they work, please send me your story. If you have had a bad experience with a computer consultant, I want to hear those horror stories as well. I might even use them in a future book!

Again, the more aware you are of what it takes to find and hire great consultants in every aspect of your business—not just technology—the stronger your business will become. I am truly passionate about building an organization that delivers uncommon service to my customers. I want to help business owners see the true competitive advantages technology can deliver to your business.

Your contributions, thoughts, and stories pertaining to my goal will make it possible. Please write, call, or e-mail me with your ideas.

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