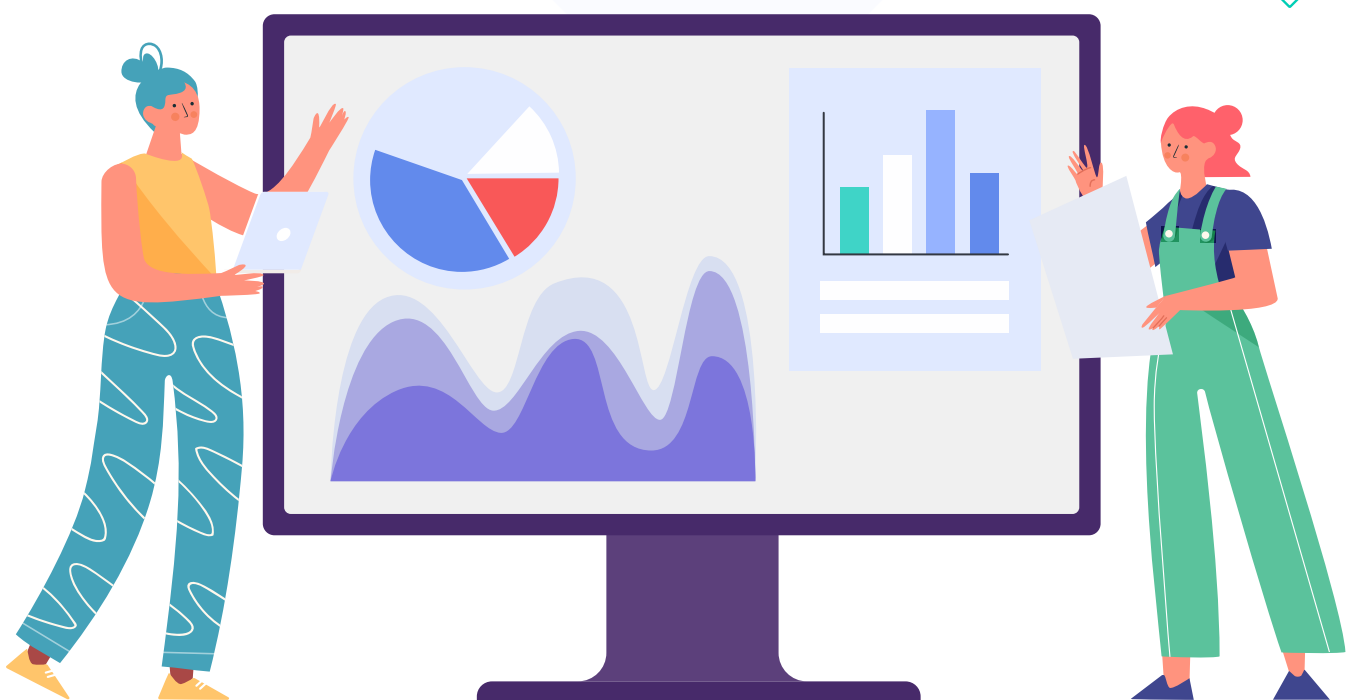


MSP Documentation Playbook



"People come and go."

This applies to all walks of life,
even for MSPs.



MSPs are generally made up of various engineers and technicians who supervise internal and external operations. They ensure systems run seamlessly and are your point of contact if problems arise.

But what if an employee leaves your MSP with information only they are privy to? It happens!

So, how do you avoid this predicament? The answer is documentation – creating and organising valuable data you and your team can access to provide a consistent level of support to your clients. Maintaining up-to-date, relevant documentation enables you to avoid chaos in your MSP if a team member is unreachable, on leave, or resigns.

Processes and data can become increasingly complicated as your MSP grows, so having an efficient documentation system in place that is readily accessible to your team is crucial to driving your MSP success.

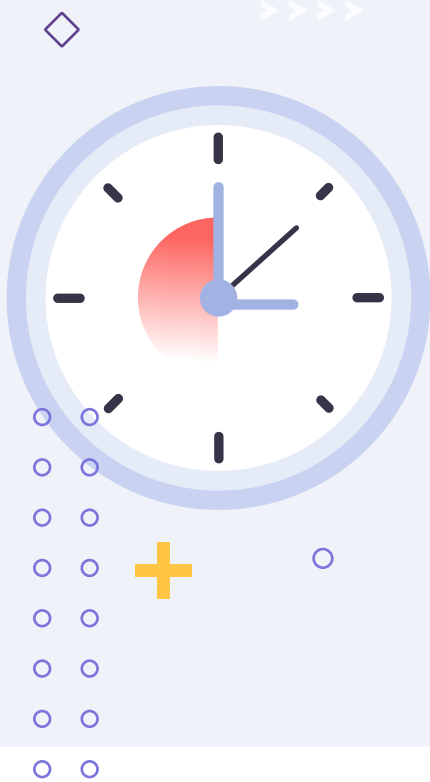
There are two categories of documentation - internal and external. Both are created for different purposes and teams.



Internal Documentation

A smooth-running MSP equals a better service for your clients, and clear-cut documentation gives all your MSP team members unified knowledge to efficiently support your customers.

Benefits:



Time Optimisation

Limited or inaccurate documentation can be a considerable time-waster in your MSP, leading to disorder and time that could be dedicated to more important tasks than webbing out your processes.

A unified and accurate source of critical information can help your engineers and technicians provide smart, fast solutions to your customers without the need to research it themselves or seek assistance from another team member. As they say, "Time is money".

[Further Reading: Common Causes of Wasted Time in your MSP \(And How to Fix Them\)](#)

Business Protection

Yes, the human mind is a powerful tool, but that doesn't mean we need to store all critical data there! Committing vital information to memory without properly documenting it and having no secure storage and management of your documentation poses significant risks for your organisation and can lead to major situations that can negatively affect your business, particularly if a team member resigns. This can all be avoided with effective documentation systems in place.



Reduced Training Costs

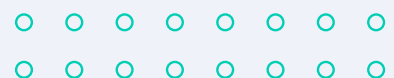
As MSPs grow and employ new staff, you're likely to spend more time and, of course, money on onboarding and training to bring new team members up to speed.

With an effective documentation system in place that new employees can refer to, you can significantly minimise the need for staff members to spend valuable time training new employees, instead letting them jump straight into maximising their billable time to support your clients.

"Make it very easy to visualise and search. If your technicians come on board and see a good working documentation platform, they're going to want to join in and do that. If it's a mess when they get there, they're just going to get frustrated and make it worse."

-Aaron Jacobs,

General Manager Rodin Business Solutions



Tips to Achieve Efficient Internal Documentation



Internal documentation training should be a requirement for all technicians prior to supporting customers. New or not, all your engineers and technicians should be consistently trained to ensure that everyone's in sync and fully capable of supporting your customers.



Update, polish, repeat. Always treat your documentation as a work in progress. The IT landscape is continuously evolving, and for your MSP to stay on track, or even better, be ahead, you must evolve with it.



Address inconsistencies immediately and revise them when necessary to avoid hiccups in your support procedures. We recommend scheduling regular team meetings to review internal documentation and ensure that it's continually updated.



Use a documentation tool that WORKS. These days, MSPs are spoiled for choice regarding document management tools, but it's important not to get distracted by fancy features; instead, focus on core functionality and usability for your team. A documentation management tool can have all the features in the world, but if it's too complex to use, your documentation will suffer. Later, we will talk about a few documentation software tools we recommend.



Get everyone involved. No one's more qualified to validate and improve your documentation than your technicians. They are the ones on the front line with first-hand experience of your customers' environments, so it's critical that you get them on board and encourage a culture where good documentation is non-negotiable.



Avoid deleting - Archive instead. Just because information is old doesn't mean it's no longer useful. Having access to your old documentation files can provide your team with references and help you trace changes that have occurred.



Make it readable and easy to understand. When writing documentation, it's important to keep your readers front of mind. Effective documentation should address technical issues in a clear, precise manner. Don't make it too complicated by including irrelevant details. Implement a structure that everyone can understand and follow when building and revising your documentation.

Check the clarity of your documentation by asking all team members – from beginners to advanced technicians – to read the documentation and ensure it's understandable enough to guide them in implementing solutions. Good documentation should be functional for everyone. If staff members are spending more time deciphering the documentation than implementing it, it needs to be revised!

"You need to make documentation simple. If you're in charge of this at your own MSP or a smaller one or a two-man person, you need to be the one demonstrating how to do it. Lead by example. Not do what I say, not as I do type of approach with documentation."

-Aaron Jacobs, General Manager Rodin Business Solutions

What should your internal documentation include?

Whether you have a current documentation checklist or haven't created your documentation yet, let's start with the essential data below:



Standard Operating Procedure (SOPs)



Reference Guides



Passwords and credentials



Managed assets for clients and locations



Onboarding checklist and plans



Code of Conduct



Core Values

IT Documentation Software you can try:

As mentioned earlier, there are a plethora of documentation tools available, so to help you with your research, below is a list of IT documentation software we recommend:

 **ITGlue**

 **Hudu**

 **Confluence**

 **ITBOST**
a  ConnectWise solution

 **PORTAL**

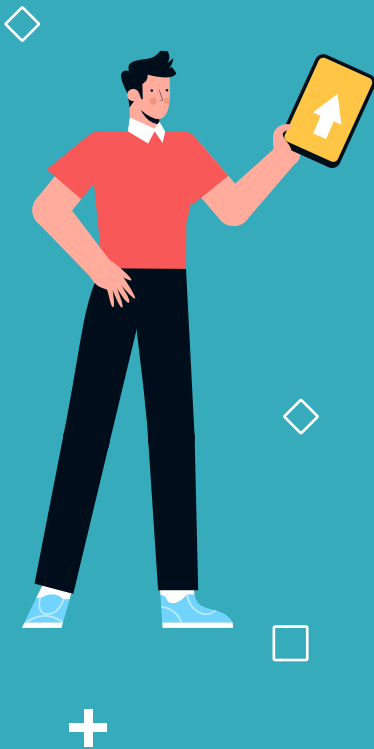
External Documentation or Customer Documentation

While your primary goal as an MSP is to provide fast, efficient support to your customers, it's not always easy to juggle several clients simultaneously. As your client list grows, it's important to leverage your MSP's customer documentation to provide them with basic solutions and reduce their reliance on your technicians.

Benefits:

>>>>

Boosting Customer Service



At Hosted Network, we appreciate the importance of excellent customer service. That's why we consistently invest time and effort to craft varying ways to improve our partners' experience working with our team.

One of these is providing comprehensive content such as sales and marketing resources that can be downloaded in our Partner Content Hub and guides to our solutions, as well as FAQs and troubleshooting articles that can be accessed through our Knowledge Base.

For MSP's, one of the most effective strategies to maintain customer loyalty is to give your customers all relevant information so they don't need to contact you whenever even the smallest of issues occurs. Provide them with comprehensive documentation that enables them to deal with basic repairs themselves. Reduced support requests mean your customers are satisfied with the information that you are providing them.

Less Support and Waiting Time




Building external documentation can be beneficial for both your MSP and your customers. If done right, creating concise documentation for your clients can save you tons of support time. End-users requiring assistance can refer to the documentation rather than calling you for support, and with data available in hand, customer waiting time will also be reduced.

Helps in Educating End-users

One of the major challenges MSPs face today is how to rise above the tight competition, so it's important to try and differentiate your MSP from the rest. Aside from exceptional customer service, accurate documentation helps educate end-users on fixing issues. You know you're on the right track if your customers are requesting additional documentation materials rather than support from your MSP. This confirms that your content hits the spot and is genuinely valuable to your clients.

Guide to Achieving Effective External Documentation

External documentation can only be effective if written correctly. Here are some points to consider when writing documentation for your customers:

-  **Determine what your customers need.** Establish where your customers usually require assistance and address these one by one by building easy-to-digest technical guides.
-  **Keep it accessible and inform customers of any changes in existing content and new uploaded documentation.** No matter how essential your information is, if it's not accessible, your efforts will be wasted. Set up centralised storage of all recorded documentation that your customers can refer to whenever they need to address simple IT issues. Also, keep them updated on regular changes you're likely to make to ensure everyone is on the same page. Similarly, keep customers informed of all new uploaded documentation.
-  **Think of your readers as you write.** Remember, IT and business people speak in different languages, so it's important to design your documentation in a manner that customers can easily absorb. Your end-users' knowledge is unlikely to be as extensive as yours in terms of all the specifics in your documentation. Having said this, you need to ensure that your customers can easily understand it. Enhancing your documentation by including photos, diagrams or screenshots and minimising plain text can help your readers understand it easier.

What should your external documentation include?



Instructional Materials
(How-to Articles, Step by Step Guides, etc.)



Technical Support
Policies and Procedures



Service Level
Agreements (SLAs)



SSL Certificates



Security and Network
Overview



Old and Existing
Projects



Support Contact
Information

Wrap-up

"Tell us what your documentation processes are and we'll tell you who you are."

Your documentation is one of the key elements that define your MSP and we hope this piece helps you realise the value of effective documentation.

Implementing a documentation system can be overwhelming at first, but the long-term benefits are extremely helpful in improving your MSP's overall efficiency.

Know our partners' take on building efficient IT documentation and other essential key drivers for your MSP's growth.



Other resources you may find interesting

On demand webinar MSPs
in Conversation

**MSP Operational
Maturity: Tackling
Growing Pains at
Different MSP Sizes**



Blog

**Common Causes of
Wasted Time in your
MSP (And How to Fix
Them)**



Infographic

**The Stages of
MSP Operational
Maturity**





About Hosted Network

Everything we do is based around building solutions for our partners to enable them to grow and succeed.

Starting off as a traditional MSP in 2003 and launching a number of direct to market cloud offerings, we quickly gained traction in the SMB market and were approached by a number of other MSPs asking if we could provide our services at a wholesale level.

We quickly realised a gap in the market for wholesale cloud services designed for MSPs to grow their service offering and reach new markets.

In 2013, Hosted Network transitioned to an entirely channel-only model, working hand-in-hand with MSPs to grow their business and win new deals.

Since then, our success is credited to and driven by the success of our partners. This has led to us adopting a simple mantra of **BUILD – GROW – SUCCEED**. Building successful partnerships and solutions, growing together, succeeding together.

For More Information:

To find out more about Hosted Network products and solutions, please visit



Call our friendly Sales team on
1300 781 148 option #1



Shoot us an email at
sales@hostednetwork.com.au



Visit our website
www.hostednetwork.com.au

