



# An MSP's guide to efficient time tracking and ticket notes



Time tracking and ticket notes are critical for all MSPs to ensure your business runs smoothly and profitably. These tasks are often overlooked, particularly when you're swamped with day-to-day activities. It's not uncommon for MSP staff to rely on their memory rather than documenting what they did and how long it took them. Unfortunately, this results in lost productivity both for your team and your customer.

Having your team undertake consistent time tracking and ensuring they are adding notes correctly is a headache all MSPs will face at one point or another. To help you out, here are some effective tips to improve time tracking and ticket note writing:



# 1. Improve your processes

The first step for improvement is setting ground rules on time logging and ticket note expectations.



For example:

- Make it clear what time is tagged as billable and non-billable, and if your PSA supports work types, ensure what they are and when to use them is clearly communicated to your team.
- Provide examples to your team of what a suitable ticket note looks like and ensure the expectation is clear on what should and shouldn't be included.
- Help your team understand why time logging and ticket notes are important.

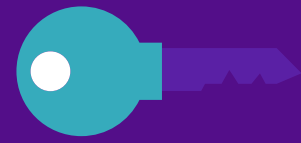


Ensure you cover these off regularly during technical staff onboarding and that they are reinforced often. Consider having a print-out of what the standard is and highlighting team members who are doing well during staff meetings.

Here is a guide on what to include in your ticket notes:

1. Actions taken to contact the customer. For example, if you called the client and they didn't answer, this should still be noted to show a clear timeline.
2. Permission change authorisations - who authorised the changes and when the changes were made.
3. Time and date of remote access to client's devices.
4. Passwords shouldn't be included. These are best stored in a secure documentation platform such as IT Glue, Hudu, etc.
5. Next steps required - If further work is required or the ticket has been escalated, this should be clearly noted.
6. Time and date the issue was resolved. Note that some PSA's may have a dedicated "Resolution" field rather than a regular ticket note.

## 2. Consistency is key!



Whether you're paid by the hour or for a fixed rate, time logging is important to boost your MSP's productivity and profitability. When time spent working on different types of projects or support tasks is properly tracked, you'll be able to gauge upcoming projects more accurately and avoid under- or over-charging, or even overworking your team.

This data will also help you predict resourcing and budget on when to hire additional resources.

Many MSPs make the mistake of having

Consistency here is key. You need to find ways to have these items become muscle memory for you and your team. If you have a role such as a service desk manager or team leader, consider making it their responsibility to manage and report on time tracking and ticket notes weekly.

To help with consistency, consider gamifying the approach through the use of dashboards, where team members can compare with time entries with their colleagues. Tools such as BrightGauge allow you to quickly set up dashboards from the data already within your PSA.

### Knowing the capabilities of your techs

Analysing your time tracking data also gives you a clearer picture of your team's capacity - see who regularly completes projects faster than others, who is close to burnout, and who is struggling to keep up with their tasks. Knowing this information will allow you to assign workloads more efficiently (and fairly) and help alleviate the pain points of technicians who are having a hard time completing work.

Many PSAs have an option to classify the ticket against a category. If so, this data will enable you to see which techs can resolve specific issues the quickest and help identify who might need additional training in various areas. As an example, you may find that a particular tech struggles to deal with backup issues due to the total time logged against the ticket category "backup issues".

Again, using reporting tools and dashboards to monitor this regularly will help identify these types of issues without the need to go digging.

### Determining customer's profitability

Time tracking data also gives you an idea on which customers your techs spend most of their time, helping you determine the underlying costs to support each customer.

This is not only important in justifying your points during contract review and renegotiations, but it also helps you identify the factors and issues that might be burning the profitability of your support contracts.

**PRO TIP:** *Make it a compulsory rule to log time before closing a ticket. This should be highlighted in your onboarding process and documented in your SOPs and training guides.*

*This should also apply to ticket notes. Don't hesitate to record specific actions done when resolving an issue. This will reduce the need to discuss the status of the issue unnecessarily among your team.*

## Promotes transparency and accountability

Accurate ticket notes also promote transparency and accountability. If customers complain about poor support and slow service delivery, you can always check your ticket notes to advise customers of the efforts made to fix the issue they have reported.



## Determining best practices

Detailed ticket notes are also a great way of identifying your team's best practices in solving different issues. When you encounter the same or a similar problem, it'll be easier for your techs to fix as there's a reference that will guide them on how to solve it immediately.

# 3. Automate!



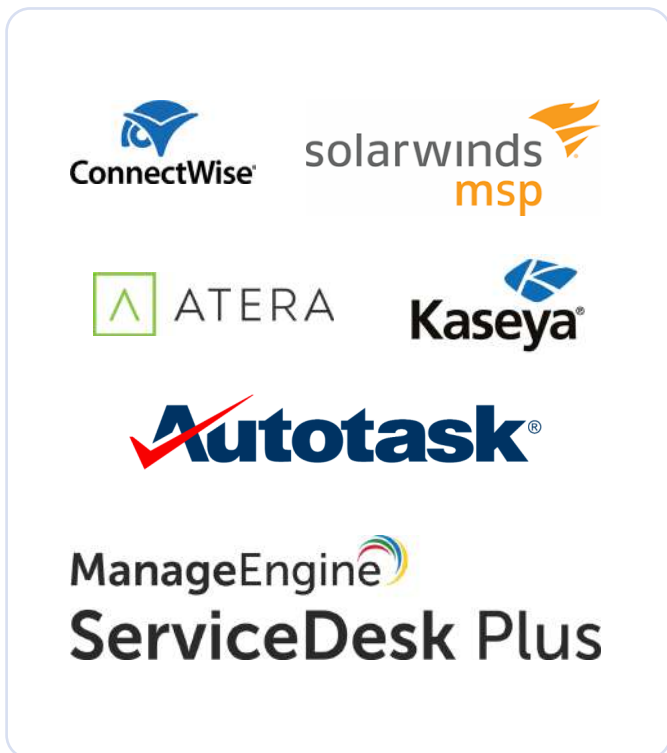
Manual processes carry a higher risk for human error. If you bill based on inaccurate time logs, you'll be bringing in inaccurate profits too. Similarly, erroneous and unstructured ticket notes will hinder your team's productivity.

Logging time and ticket note writing shouldn't take too much of your tech's time. Investing in PSA and helpdesk ticketing tools that provide efficient time tracking and ticketing capabilities can help your techs manage their time and workload better.

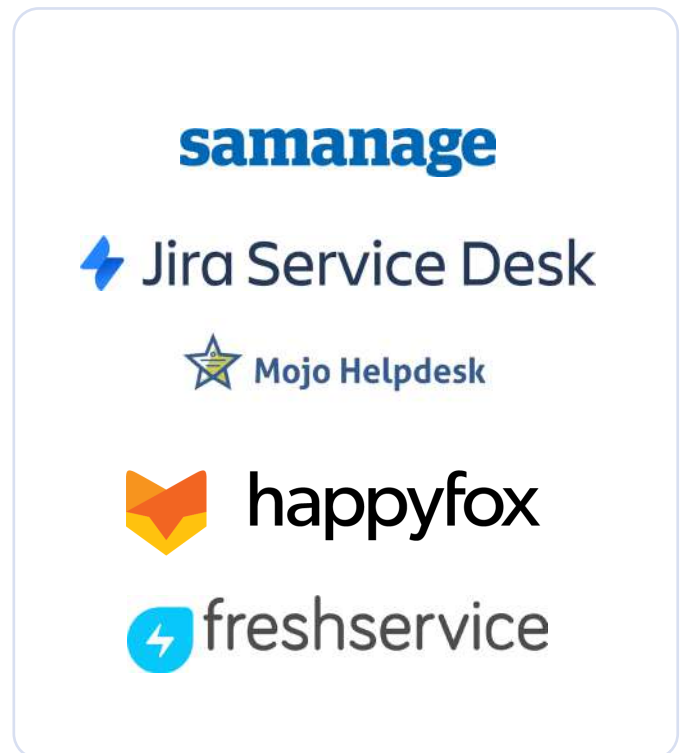
When looking for time tracking and helpdesk solutions, consider these key features:

- Can be easily integrated into your current systems and fit your workflows to streamline logging time to actual billing
- Generates essential reports easily and quickly to reduce admin time
- User friendly, easy to learn and built for MSPs
- Secure and can protect important data
- Has reliable customer support

## Some PSA solutions to check out:



## Helpdesk ticketing systems worth a shot:



# Working towards your goal

Consistent processes and a common goal can unify your team to achieve seamless time tracking and ticket note writing. Although some techs might initially view these tasks as micromanagement, communicating to them why it is being done and how the whole team can benefit will prevent them from thinking they are constantly being watched or monitored. This often leads to stress and low employee morale.

Accurate time logs and ticket notes are great tools in helping your team identify priorities, manage and complete tasks, and most importantly, bill customers accurately and grow your MSP.





# 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



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