

Table of Contents

About the Author	xv
Acknowledgments	xvii
Introduction	xix
First, Let Me Talk You Out of This...	xxv
Chapter 0: The Joy of Being a Sole Proprietor.....	xxvii
Chapter 1: Build the Offer	1
Before You Get Started: Take Care of Yourself.....	2
Research What Should Be in an Offer	4
Pricing	7
Building the Offer	11
The Hourly Offer	11
The Retainer Offer	13
The Managed Services Offer	14
The Fixed-Fee Offer.....	16
Build the Contract	18
Service Level Agreements	21
Does This Pass the Sniff Test?!?!	26
Funding Your New Adventure	27
Growth Requires Capital.....	28
Conclusion	29
Further Reading	29

TABLE OF CONTENTS

Chapter 2: Beyond Services.....	31
Reseller Accounts	32
Selling Mobility	34
Should You Sell Cloud Services?.....	37
If You Do Sell Cloud	41
Evaluating the Security of Cloud-Based Solutions.....	43
Referrals vs. Selling	47
Providing Hardware and Software	47
Providing Infrastructure Services	49
Further Reading	52
Chapter 3: Hiring and Human Resources.....	53
Decisions, Decisions	53
Before You Hire	56
Where to Post Your Jobs	57
Writing Job Postings	59
Reviewing Resumes.....	60
Interviewing	62
Phone Screening	63
In-Person Interviewing	64
Making The Offer.....	66
Onboarding New Employees.....	67
Wikis for Onboarding	70
One-on-Ones.....	74
Training	75

TABLE OF CONTENTS

Individualized Learning Plans.....	76
Layering Training Assets.....	78
Conferences	81
Meetups.....	85
Sites For MacAdmins.....	86
People to Follow	87
Inspiring Employees to Learn	90
Learning to Lead.....	93
Soft Skills	96
Signs It's Going to Get Hard to Retain Someone	106
Diversity	109
Outsourcing HR	113
Conclusion	115
Further Reading	115
Chapter 4: Accounting 101	119
The Concepts	119
Buying Accounting Software.....	124
Accepting Payments	125
Accrual-Based Accounting.....	126
Hiring an Accountant.....	126
Doing Taxes.....	128
Insurance	129
Cash Flow	130
Conclusion	131
Further Reading	132

TABLE OF CONTENTS

Chapter 5: Buy Software to Automate the Business.....	135
Choose Your Tools	136
Device Management	136
PSA, MSA, RMM, and BDR (Oh My!)	138
BDR Software	139
Some RMM, PSA, and MSA Solutions to Consider	140
The App-Based Economy	144
Automation Services	146
What to Expect When Building Software	147
The Customer Scorecard	149
The Balanced Scorecard	150
Financial	150
Customer	152
Internal Processes.....	153
Learning & Growth.....	155
Testing.....	157
Techie Bits.....	158
Antivirus	162
Automation Tools	163
Backup	164
Collaboration Suites and File Sharing	165
CRM	166
DEP Splash Screens and Help Menus	166
Development Tools, IDEs, and Text Manipulators.....	167
Digital Signage and Kiosks.....	169
Directory Services and Authentication Tools	170

TABLE OF CONTENTS

Identity Management.....	170
Imaging and Configuration Tools	171
Log Collection and Analysis.....	172
Management Suites.....	172
Misc	174
Point of Sale	175
Print Servers.....	175
Remote Management	176
Security Tools	176
Service Desk Tools.....	177
Software Packaging and Package Management.....	178
Storage	179
Troubleshooting, Repair, and Service Tools	179
Virtualization and Emulation.....	182
Honorable Mention	182
Conclusion	183
Further Reading	183
Chapter 6: Make Friends: Develop Partnerships	187
Engaging Customers for Referral Business	188
Finding the Right Partner	189
Structuring a Partnership	190
Quid Pro Quo	191
Subcontracting vs. Partnering	192
Dealing with Problems with Partners	194
Conclusion	195
Further Reading	196

TABLE OF CONTENTS

Chapter 7: Engage in Free and Guerrilla Marketing	199
Examples of Guerrilla Marketing.....	200
Search Engine Optimization.....	206
E-mail Automation	211
What to Do and What Not to Do.....	214
The Cadence	217
Social Media	218
Conferences	221
Conclusion	224
Further Reading	226
Chapter 8: Using Public Relations	229
Getting Started With PR.....	229
Gather All Your Social Properties	230
Publish a Media Kit.....	230
Gather Local Media Contacts.....	231
Gather Industry-Specific Media Contacts.....	231
PR Template.....	231
Decide What Kind of PR Works Best for You.....	232
Local PR	233
Haro	234
Press Releases.....	236
Press Release Tips.....	237
The Anatomy of a Press Release	238
Seasonal PR and Marketing	242
Hiring a PR Firm	245
Understand How They Work	246
If It Isn't Working, Switch Firms.....	248

TABLE OF CONTENTS

Things to Stay Away From	248
Conclusion	250
Further Reading	250
Chapter 9: Advertising.....	253
The Three Phases.....	253
Buy Advertising	255
Blogs	257
Buy Advertising on Podcasts.....	259
Search Engine Advertising	260
Online Advertising	262
Radio Advertising	264
Print Advertising.....	265
Coupons, Sales, and Specials	265
The Wrong Calls	266
Marketing Development Funds	267
Conclusion	267
Further Reading	268
Chapter 10: The Art of Selling.....	271
Choosing a Sales Methodology	272
Why Sales Methodologies	272
Choosing a Methodology	273
Making the Methodology Selection	281
Implementing Your Methodology.....	282
Working with Big Companies	283
Conclusion	286
Further Reading	286

TABLE OF CONTENTS

Chapter 11: Diversifying Your Portfolio	289
What Is a Good Addition?	289
Be Wary When Moving Forward with Initiatives.....	291
What You Should Do Before Proceeding	292
Are You Overvaluing Your Time?	294
Implementing a New Offering	294
Review the Offer.....	295
Compare the Offer to the Market	295
Make a Project Plan.....	295
Make a Sales Plan	299
Fail Fast.....	301
Dealing with Failure	301
Why Customer Initiatives Fail	302
Why Our Technology Initiatives Fail	302
Dealing with Success.....	305
Conclusion	308
Further Reading	308
Chapter 12: When to Stop Growing.....	311
Communicating with Employees.....	312
Leading (And Retaining) Teams After the Growth Subsides.....	312
Letting People Go	315
Managing Finances When You Stop Growing	316
Conclusion	318
Further Reading	318

TABLE OF CONTENTS

Chapter 13: Sell the Company	321
Who Is Going to Buy the Company?	322
Valuations	324
Multipliers	326
Non-Compete Agreements and Covenants	327
Are You Going to Stay with the Company?	328
Wielding Political Capital	328
Conclusion	330
Further Reading	331
Chapter 14: The Part-Time Owner	333
A Part-Time Job	333
Set an Expectation	335
Put Someone in Charge	336
Find Someone to Run the Company	336
Letting Go	338
When Things Aren't Going to Plan	339
Don't Complain	339
Conclusion	344
Further Reading	345
Chapter 15: Buying Companies	347
Make a List.....	347
What Are You Actually Trying to Buy (or Roll Up)?	348
Approaching Acquisition Targets.....	351
The Finer Points of Acquisitions.....	352
Company Culture.....	353
Merging Operations.....	354

TABLE OF CONTENTS

The Numbers.....	355
Rather than Acquire	357
Are Assets Transferrable?	358
Don't Make a Bad Deal Just Because You Can't Let Go	359
Merge the Companies.....	359
Conclusion	360
Further Reading	361
Chapter 16: Running a Consulting Practice Inside a Larger Company	363
What Does the Company Want You Doing?	364
Getting the Right Mix.....	364
Building Service Packages.....	366
Change Control	367
Operationalize Services.....	368
Marketing.....	370
Sales, Sales, Sales	371
Staffing	373
Professional Services as a Service: Subcontracting	374
Conclusion	377
Further Reading	378
Appendix A: Getting into a Rhythm.....	379
Close Accounts You No Longer Need	379
Remove Duplicate Services	380
Delete Apps You Don't Use	380
Organize Your Files	381
Remove Old Fonts	381

TABLE OF CONTENTS

Clean Up Your Mail	381
Connect Your Apps	382
Remove Old Device Drivers and Devices	382
Rotate Passwords	382
Review Your Device Security.....	383
Update Your Device Inventory	383
Review the Fees for Every Contract.....	384
Make More Money	384
Appendix B: Common Apple Terms.....	385
Appendix C: Sample Managed Services Agreement.....	391
Standard Services Agreement	391
Appendix D: Using Trendlines In Microsoft Excel	403
Appendix E: Common Job Titles	409
Appendix F: Device Scorecard	415
Access to the Organization's Network	415
Access to Organizational Resources.....	416
Cradle-to-Grave Device Management.....	416
Directory Services.....	416
Endpoint Protection.....	417
World Class Support.....	417
Appendix G: Additional Reading	419
Index.....	423