

MSP SUCCESS

MAGAZINE

ROBIN'S FIGHT

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October/November 2020

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1. Compliancy Reporting

- Look ma (and government compliancy agencies) – no breach!

2. Remote Access Controls

- Kill data immediately if a breach detected,
- Quarantine data until correct access can be confirmed.
- Easy-to-administer authentication controls.

3. Automated Security Responses to WFH Risks

A remote workforce inherently puts your clients' systems at increased risk. The time is now to provide a higher level of protection for your clients. Don't allow relaxed controls and additional vulnerability to lead to a successful exploitation of your clients' systems or data. Criminals are adapting their strategies to infiltrate WFH vulnerabilities.

Beachhead's SimplySecure for MSPs provides value-added WFH Protection.

SimplySecure Compliance Report by Techmanage IT for Physco Pharmaceuticals

Device name: FSN-DAN-HPWin10.Domain
Device type: PC, USB Storage, Phone
This report generated: September 21, 2019 3:33 pm PST

Incident Report

Date of incident (last): August 21, 2019
Hardware serial number: 987324048975-685274
Hardware last in the possession of: Dan Makhlem
Last logged in user: Dmakhlem0234
Description of hardware loss: Employee was traveling and at San Francisco International Airport was called to travel gate bagging computer with family. On return to seat, family had moved and computer was gone. Physcoan0234
Last IP address recorded: 91.01.08 (recorded 21/14/19)

Encryption

EFSS (Encrypting File System) [X] BitLocker [X] in place on all most recent drives. August 21, 2019 4:37 am PST

Access Controls

Password policies enforced by SimplySecure
Maximum password length: 14 characters
Minimum password age: 1 year
Require complex password? [X]

The following policies put in place: August 21, 2019 5:37 pm PST

Quarantine [X] At rest content in SimplySecure will destroy encryption keys rendering access to encrypted data all but impossible. Executed: August 22, 2019 4:37 am PST

Device Access Policy [X] Enforced

Automated Defensive Actions

Pre-defined policy response put in place: January 3, 2018 5:37 pm PST

Time-Based Access Control

EFSS encryption keys wiped after [X] 2 weeks calendar time and 8 hours computer offline. Executed: August 22, 2019 4:37 am PST

BitLocker encryption keys wiped after [X] 2 weeks calendar time and 8 hours computer offline. Executed: August 22, 2019 4:37 am PST

Persistent shutdown mode in place [X] 2 weeks calendar time and 8 hours computer offline. Executed: August 22, 2019 4:37 am PST

Invalid Login Responses

Shutdown after 4 consecutive invalid login attempts [X] Executed: August 22, 2019 4:37 am PST

Chasing containing the badge after 3 invalid login attempts [X] Executed: August 22, 2019 4:37 am PST

BitLocker encryption keys wiped after 8 invalid login attempts [X] Executed: August 22, 2019 4:37 am PST

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For details on the both the pricing discounts and the TMT referral program please visit:
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The paper used in the production of MSP Success Magazine includes post-consumer waste and is produced using sound environmental practices, waste reduction, and energy-efficient operations. Our paper has FSC certification and passes the SFI Chain-of-Custody Standard. Read more at WFPaperCo.com/sustainability.html.

If we wait for the moment when everything, absolutely everything, is ready, we shall never begin.
—Ivan Turgenev



I first met Robin in mid-2005 at the Microsoft campus during one of the old SMB Nation annual conferences. Although still very early in the business, she was a force to be reckoned with on stage and could talk a room of IT professionals (including me) into purchasing something they really didn't want: a kit on marketing your IT business. We were all there to learn more about Small Business Server and all things IT, but we walked away from that event with the tools that could explode our businesses. That chance encounter resulted in the massive growth of my IT business over the next 18 months and completely changed my perspective on running a true business.

Little did I know that Robin's own business at the time was a two-person operation running in a small office over her garage. She was running a successful micro business and could sell like no one else, but she didn't yet know how to run a real business with a successful team (she admitted years later that she was afraid to build a team at the start). For years, employees were a four-letter word around here. But just five years after my initial encounter, I had sold my MSP business to come help build the organization.

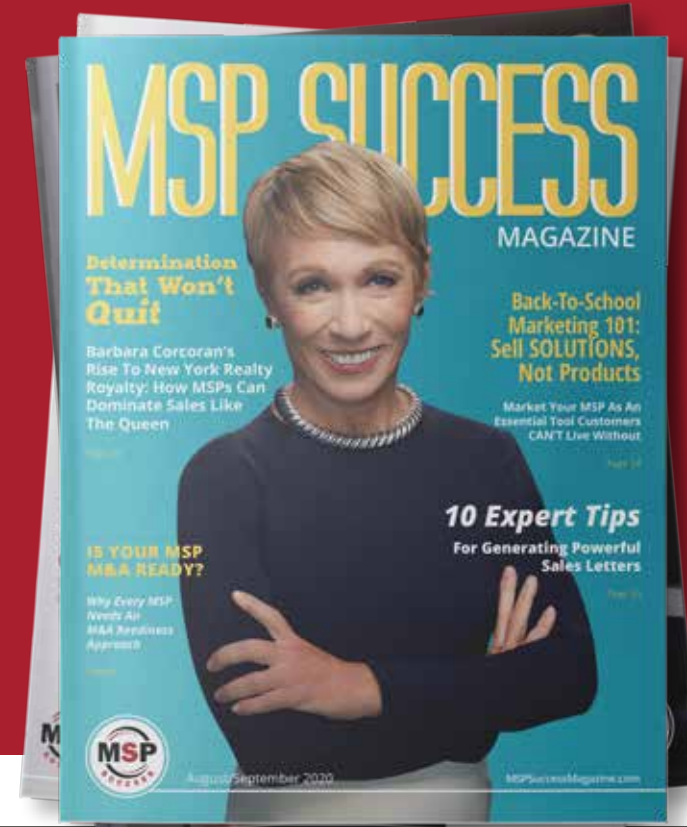
Over the last 10 years, Robin has turned Technology Marketing Toolkit from a small, six-person startup with self-study products and a small mastermind group into a \$20 million per year, 50-person operation with the largest peer mastermind group in the MSP industry, a world-class CRM and marketing automation software platform, an industry magazine with over 17,000 CEOs on

its distribution list, the third largest event in the MSP channel every year, and a separate media company (Big Red Media) for channel companies.

She is an inspirational leader within the community and is not afraid to speak her mind (even if a bit controversial at times). I'm thrilled that we are finally able to share Robin's full story in this issue with the MSP community as a whole. ■

Jeff

Jeff Johnson
Executive Director
Big Red Media/Technology Marketing Toolkit



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LEVERAGING IT AUTOMATION TO INCREASE PROFITABILITY AND REDUCE COST

4 Steps To Save Time (And Money!) By Automating Common IT Tasks

"Time is money." It's a centuries-old adage that first appeared in our lexicon when Benjamin Franklin penned the words in 1748. This phrase is no truer today for any industry than for MSPs. You and your technicians only have so much time in a day, so minimizing tickets and the time spent on common IT tasks can help you gain time elsewhere, increasing your business's profitability and enabling you to scale.

In order for an MSP to grow, there must be a concentrated effort toward efficiency throughout your organization. The most valuable asset to your bottom line is time, and the No. 1 cost

for any MSP is labor. Every penny spent on your IT tool stack should have a direct impact on not only driving profit but also on reducing your labor cost. To maximize your technicians' time and get the most out of your resources, you *need* to adopt heavy use of IT automation.

By streamlining the services your clients rely on, you free up your time to focus on the root cause analysis of recurring tickets, which can save you even more time and money, creating a perpetual cycle that can lead to an even stronger business. This is accomplished by removing downtime from the equation while also securing data and protecting infrastructure. By automating repeatable and routine tasks, you can provide a comprehensive IT management service at an affordable rate for your clients and can grow your business in ways you may have never thought possible.

When you work toward a sustainable system in which your technicians can focus on bigger, more valuable issues, you'll find productivity increasing, operating costs decreasing, and a boost in profits and scalability. To get there, follow this four-step playbook for IT automation success.

Step 1: Determine Which Functions To Automate

Begin with the obvious: processes that are ongoing and repetitive. Think of the routine tasks your technicians do day in and day out for clients — things they could do in their sleep (and hey, maybe they have). For example, IT documentation has always been a time-consuming but necessary task to keep your team functioning as a cohesive unit. With IT automation, it's relatively simple to streamline your documentation, and the benefits of documentation are never lost. Instead, you continue to retain the valuable information that promotes continuity among technicians without wasting time on creation.

Other simple, yet important, examples include software updates and patches, regular disk cleanup and backups, customer-facing functions like reporting and ticketing, and compliance processes.

Step 2: Adopt Automation To Deliver Proactive Services

No matter your remote monitoring and management (RMM), professional services automation (PSA), or IT documentation

tools preference, you can easily find the automation solutions you need to make it happen and begin implementing the process. Start with some of your easiest processes to offload, like software updates or cleanups. These services are more proactive and demand a limited amount of manpower. By offloading them onto IT automation first, you're freeing up more time immediately and testing a new procedure on a process that's not as detrimental as repairs or patches.

RMM tools enable MSPs to automatically perform a variety of diagnostic and preventive maintenance routines to identify potential difficulties before they become major problems. And PSA tools allow technicians to remotely enter the time they completed services, which makes time and tasks easily trackable. This is invaluable in calculating the cost of service delivery.

When your RMM and PSA tools are integrated, IT automation success is inflated, and your processes become more scalable.

Take automation to the next level and consider inviting your customers to the automation party. Many end users are now more tech savvy than they were just five years ago, so look to invest in self-service capabilities for activities that clients can perform themselves, such as password resets. A self-service portal opens your help desk to clients with restricted access so they can log incidents and service requests, find resolutions, and track the progress of their tickets by themselves.

Step 3: Manage Dynamic Cloud-Based Solutions And Advanced Automation

The cloud offers solutions that no other platform can, and the implementation of RMM and PSA tools can enable MSPs to seamlessly manage these dynamic solutions. Cloud-based solutions can pair with already existing platforms to transform your processes. This is IT automation at the next level. It can be used for endpoint and network security, backup, business continuity, and end-user security awareness training.

Compliance process automation platforms can also aid in furthering your IT automation into platforms that are custom-built for your clients and your process. Some of these tools even offer a wizard-driven workflow engine and programs for automated networks, computer data discovery, and built-in compliance, which can maintain and provide evidence of a client's compliance.

As you transform how IT automation works and looks for your MSP, you can adapt it with tools found in cloud-based solutions or compliance process automation. The process will advance, and along with it, the solutions you can automate.

But that's not all you can do. Your IT management tools can fix issues automatically by executing scripts in response to an alert. Here's a simple example: You have to set up a monitor that generates an alert when disk space is low on a server or workstation. Next, you want to automatically validate that condition. Then, remediate the problem by executing a script to

clean up the disk space. Lastly, you may want to run a weekly report on all of the alerts that have occurred during the prior week.

Step 4: Automate Routine Tasks With APIs And Scripts

Why reinvent the IT automation wheel? There are experts who have been in your very position and asked, "How can we streamline this process?" Looking to those industry leaders and other MSPs who have "been there" is a powerful tool. This is not an idea that's lost on MSP IT automation tool innovators like Kaseya.

"We've adopted a unique, crowdsourced approach for enabling our MSPs to harness the power of IT automation," says Taunia Kipp, executive vice president at Kaseya. "With our Automation Exchange, which is Kaseya's peer-built marketplace for sharing, buying, and selling Agent Procedures, scripts, monitor sets, reports, templates, and other types of automation for Kaseya products, we built an automation sourcing platform into our offering that allows technicians to upload the automation they have created so that others can take advantage of it. While the majority of the automation available in the exchange is free to download, MSPs have the option to charge for their contributions. The exchange allows MSPs to save time and boost productivity while battling pricing pressure and streamlining their workflows by leveraging the power of over 10,000 engineers and Kaseya automation experts."

As a real-world example, think back to when just about every system you were monitoring had to make the switch to Windows 10. Microsoft's Windows 10 update was known to be the most bug-prone update in the company's history. File deletion and driver compatibility issues created a never-ending saga of challenges. If you weren't one of the shops who automated the process using scripts, your technicians could have spent that time of major transition and overhaul focusing on individual client needs and unique scenarios while your automation station did most of the work. Imagine how infinitely better that process could have been and how much more attentive your technicians could have been.

This process can also work with automating patch management — something that is often missed for many MSPs — routine server maintenance, billing statements, and backup testing. You'll prevent problems from happening without having to even think about starting the process. Your IT automation process will have you covered, and your business will scale powerfully.

IT automation doesn't take your team out of the game. In fact, it better prepares them for bigger, more important opportunities in the future. As a result, your processes will begin to work for you, your team, and your clients, saving you valuable time and ultimately earning you more money than you thought possible with the nitty-gritty of IT work. ■

Common IT Processes Ripe for Automation

- Remediation of common IT tasks such as printer errors, low disk space, password resets, and more
- Software updates and patching on all devices, on- and off-network
- Discovery of assets on a company network
- Data backup to the cloud or an on-site appliance
- Compliance reporting

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Part 3:

The Biggest Ways MSPs Burn Profits



A so-called “friend” recently played a cruel joke on me. I was tricked — no, bamboozled — into witnessing train wreck after train wreck.

A full two hours of debauchery, scandals, alligator tears, fake tears, catfights, fistfights, makeups, makeouts, and more, all of it aiming with laser focus toward one thing ...

A proposal.

Not a business-meeting proposal or a profit-fueling proposal. This friend lured me over to her house one Monday evening with the promise of wine, only to tie me to the couch to watch “The Bachelor.” Dear. God. Help.

The lengths to which these ladies went to impress this oaf were INSANE! They were fixated, driven, savage women. After

the wine buzz finally (and thankfully) kicked in, I did start watching the show differently and actually took one big lesson from it that I instantly knew I wanted to write about this month.

I Want You To Woo Your Leads With The Same Ferocity As These Bachelorettes.

I want you to pay loads of attention to them, schedule a date with them the instant they give you any attention, send them surprise gifts, remind them you can’t wait to see them, and hound them if they need to reschedule on you. Impress the hell out of them so you can get the same thing the bachelorettes want.

More Accepted Proposals

From the very instant a lead approaches you, whether it’s online or in person, they are sizing you up to see if you’re “business marriage material.” Every interaction they have with you impacts their decision whether or not to bring you on as their MSP, and **if we can increase the frequency, personalization, and overall positive experience that our qualified leads have with us, we can increase the number of accepted proposals.**

A Look At The Numbers

MSP Averages

New Leads: 72 (six per month)

Appointments Sat: 35 (48% of leads end up in appointments)

Proposals Generated: 24 (69% of appointments end up in a proposal)

Closed Deals: 12 (50% of proposals are won)

Average First Year: \$25,119.32

Total Annual Payout: \$301,431.84

In the past few months, we’ve looked at how to get more leads and sat appointments. Now, let’s look at the numbers with even just a small increase in the number of proposals.

Increase In Number Of Set Appointments, Sat Appointments, And Proposals Generated With Automation

New Leads: 86

Appointments Sat: 58 (68% of leads)

Proposals Generated: 44 (75%)

Closed Deals: 22 (50%)

Average 1st Year: \$25,119.32

Total Annual Payout: \$552,625.04

How Do You Get More Proposals From Your Dates?

Marketing Example #XX outlines at a MINIMUM what should happen in your sales process in order to “wow” your prospects and impress the crap out of them before you even step into your first meeting with them. *NOTE: This is also the exact campaign blueprint for our Infusionsoft by Keap clients for how we automate each step in Infusionsoft for your sales pipeline.*

For every lead, you ABSOLUTELY MUST have the following in order to set yourself up for proposals:

- **Immediate emails** pushing them to self-schedule an appointment at a time that is convenient for them (see last month’s article on why and how to do this)
- **Systematized call reminders** to get them to schedule AND keep the appointment
- **Programmed task assigned** to send the shock and awe
- **Reminder emails** of scheduled appointment
- **Automated “deal rot” alert** if a proposal is sitting in one sales stage for too long
- **Prescheduled, six-month follow-up** on lost deals (this same “friend” told me about the “Bachelor” scandal a few seasons ago where the guy ended up dumping the girl he chose on the finale and went back to the “second runner-up” — people make decisions they regret in business, too, and often have the same problems that go unresolved six months later. Think about how impressive it is when they get a ping from you “just checking in on them.”)

Ideally, this entire process is automated. It’s just not feasible to do ALL of this manually while you grow your business and remember to do each step at the time it’s supposed to happen for each lead. Plus, you shouldn’t be spending so much time doing this without a system!

Yes, we recommend Infusionsoft by Keap. Yes, we resell it. Yes, you need it. No, you don’t *have* to use it, but you’ll want to once you see it. Get more info at MSPMarketingCRM.com.

Will you do what Robin recommends and implement this whole system in your sales process? If you don’t automate this with Infusionsoft by Keap, will you take just ONE of these “lead dating” tips and start doing it? Will you let me know when you do this and share with me how the number of your accepted proposals increases? And one final request ... will you accept this rose? ■

Bio

Allison Foelber is the VP of Automation and self-proclaimed “Infusionsoft Nerd” at Technology Marketing Toolkit, where she helps clients leverage the marketing automation power of Infusionsoft by Keap to organize and get a handle on their sales and marketing process so they can move prospects through the sales funnel faster. She can be reached at Allison@TechnologyMarketingToolkit.com.





Company:
Electric

Year Founded:
November 2016

Headquartered:
New York City

Geographic Market:
United States

Top Growth Indicator:
Annual Recurring Revenue

YoY % Of Growth:
105%

CEO And Founder:
Ryan Denehy



Ryan Denehy Of Electric On Always Aiming To Be Better For The Customer And Locking In Your End Goal

What Are The Top Three Metrics You Use To Measure Your Business And Why?

First, we look at the rate at which our annual revenue is growing because if revenue isn't growing, then the business itself isn't growing. Second, we look at our gross margin. If the amount of money we're generating is going up, that's great, but it has to mean that the amount we're keeping is going up too. And third, we look at retention. If our customers are happy and sticking around, that means this whole thing works. The combination of those three things is what we look at to determine we're a healthy business. We assign a goal to each of those three things to find out what the right mix is, too. For example, we could push for 200% growth in a year, but then it's likely our customers wouldn't be very happy. And if we grew slower, we could probably boost our margins, but then we'd be missing out on the opportunity to win in our market. It's all about balance.

What Is The Top Lesson You Had To Learn That Allowed You To Kick-Start Your Business Growth?

We knew we had to do something different, something that would make our customers really happy. Some people try to distinguish themselves from competitors just for the sake of being different, but

for us, it was about doing something that's truly better. So we decided to invest heavily in our own proprietary software that would enable our solution to look and feel more like customers were buying software with a nice human touch instead of just contracting with a service provider. We built a customer-facing dashboard that a more technical person can find tons of utility in but that a less-technical person can still relate to and use effectively. We gave our customers the ability to log in and see exactly what's going on with their account at any time, and they love it.

What Would You Say Is The Single Secret To Your Success This Past Year?

We never stopped spending money on sales and marketing during the COVID-19 pandemic. In fact, we probably spent more money on them this year. In May, once we felt like the country was beginning to rebalance in certain markets, we immediately started hiring more salespeople. As a result, June was our second-biggest sales month ever. Had we done what a lot of other companies did, which was pull the plug on sales and marketing around April, we never would have reached those numbers. Instead, in that moment, we decided that no matter what happened with the country, people were still going to need good IT services. So we never took our foot off the gas.

What Was The Biggest Challenge You Had To Overcome This Past Year Related To Either Reaching That Growth, Or As A Result Of That Growth?

We've been growing quickly over the past 12 months, and we wanted to make sure we could continue that growth while also getting better at what we do. We wanted to build more software, partner with more companies, and deliver a wider range of services. To do that, we had to completely rethink our leadership team. It was a huge challenge because we had to hire four different senior executives in the span of six months, which seemed impossible. But we knew that if we did it, we'd be able to continue growing into a better company. If we didn't do it, we were going to have to slow down. A year later, it's easy to see how that process has completely changed the business for the better. Making those decisions wasn't easy, but they were necessary to start thinking bigger.

Who Would You Say Is The Most Impactful Business Leader Or Business Thought-Leader Whose Techniques Or Leadership Style You Either Try To Emulate, You Follow, Or Are Influenced By?

Over the last eight months, I've been fortunate to spend time with Dick Costolo, who was the CEO of Twitter for five years. He joined them back when they were about 40 employees, and he grew them to 4,000 employees and took the company public. He invested in Electric about six months ago, and his leadership style has become very admirable

to me. He's very analytics driven, matter of fact, and even blunt at times, but this all makes him extremely productive. He always points out what's necessary to learn about your company. He makes us think about what we're not learning, what's taking too long to learn, how we can find these answers, and how quickly. That degree of specificity in terms of how he thinks about growing a business is a different mindset that's been incredible to learn from.

What Book Would You Recommend To Other MSPs Or SMBs Trying To Grow Their Business?

For MSPs, I would be remiss if I didn't recommend "Package, Price, Profit: The Essential Guide to Packaging and Pricing Your MSP Plans" by Nigel Moore. It's such an approachable book that you can easily read in one weekend, and it's so clearly written, with effective ideas for how to run an MSP. For more general business reading, I recommend "High Output Management" by Andrew Grove. Contrary to my first recommendation, this one is a little more advanced and dense, but if you're running a business and want to think bigger picture about how to run and scale that business, it's a great resource.

Were there any partners or businesses that helped you along the way?

There are so many people and companies who have helped us along the way. My good friend Leif Borden first introduced me to the MSP industry back in 2012 so that's essentially where it all began. Major kudos to him! In terms of people directly helpful to Electric, we have a number of technology partners that are core to our service delivery and have been for some time, companies like Kaseya. Without them our job would be much harder!

In Closing, Do You Have Any Specific Advice Or Words Of Wisdom That You Would Give To Other MSPs Looking To Grow Or Build A Successful Exit For Their Business?

Start by deciding what you want and when you want it. I talk to a lot of people who own MSPs and haven't figured out what it is they want out of it, which means they don't know how to get to where they want to eventually be (which is usually retirement). They always say how great it would be if someone offered them a lot of money for their business, but they haven't taken the time to think about what they need to do to make that happen. If you want to keep building your MSP slow and steady and maintain your lifestyle, that's fantastic. But if that's not what you want, then you need to figure out exactly what you want, when you want it, and how to get it. Then, the only thing standing between you and that exit is your willingness to learn from people who have done it before you and to build a concrete plan to get there. Be intentional about your goal. ■

3 KEY DECISIONS To Beat The Recession And Get Customers Spending Now



“The winds of grace are always blowing, but it is you that must raise set your sails.”

–Tagore, 1913 Nobel Prize Winner

When I was a kid, my dad had a small, 24-foot sailboat we’d take on seven-day trips down the Chesapeake River. I was one of five kids but the only one who had any interest in these excursions, so it was just him and I out on the water, sailing up and down the bay from port to port. Sometimes, we’d stay in a fancy marina like St. Michaels. But mostly, we’d find a safe cove, throw the anchor overboard, and spend the night sleeping right there on the boat.

Sometimes, the weather and wind were excellent, and we’d have an exciting day, making great progress toward our destination, trawling for fish off the back of the boat, or simply sailing the thing as it hummed through the water. I’d sit at the bow of the boat with my feet dangling in the water, clinging to the railing and watching stingrays and other fish swim by. Other times, there was wind but also clouds and rain, making for a dreary day. We’d sail anyway. Often the wind was against

us, behind us, or blowing in the “wrong” direction, sometimes shifting, and we’d have to set the sails to accommodate those conditions. Still, we’d sail.

But the worst times were when there was no wind at all, and we’d bob around like a buoy on the waves, broiling in the sun. During those days, I’d beg my dad to turn the engine on so we could at least get to some port for a meal and a swim. I can count on one hand the number of times he gave up, stubborn sailor that he was.

The economy we’re in right now reminds me of those grueling, hot days when there was no wind and nothing to do but sit and wait with the sails up, hoping to catch a breeze so you could actually make some progress, eagerly waiting to get around the next point of land with the anticipation that the wind might pick up once you got around it.

This recession is unlike any others that have preceded it for a number of reasons, so it’s truly anyone’s guess as to how long it will last and how bad it will get. The good news for me is that this is not my first run around the recession track.

Back in 2008–2010, I watched thousands of small IT shops shutter their doors; nearly 30% of our list ended up closing, getting a job, or going into early retirement. The rest just weren’t spending anything — a rough time all around, indeed.

From my experience, there are three key things you can (and may have to) radically change when times get tough.

Of course, there is one more option that eliminates the need for ALL of this. If you’re independently wealthy and don’t mind your business going backward right now, you could choose to

do nothing but hunker down and hibernate for a while. That is an option, and some who are *not* wealthy will take it. They’re too timid to do otherwise.

But if you cannot withstand a 20%–50% dip in income, or, like me, the thought of going backward grinds your gears, then you’re going to need to heed my advice and get ready for a rather frustrating, annoying ride as you muck through the recession swamp.

Because here’s the maddening truth: For who knows how long, you will have to invest more, create more, do more, and be more creative than you’ve ever been *and* generate less than you’re accustomed to. It will take more work, diligence, effort, and time to get mediocre, possibly barely acceptable, results.

If you’re like me, you can resent this all you like. And I do. We were coming into 2020 on fire with insanely good profitable growth that was hard-earned from a year of intense work and planning that was just starting to pay off. Then POOF. Gone.

I had a client tell me he had \$600,000 in signed projects ready to go when COVID-19 hit and then had it instantly pulled back. Maddening. I personally had to refund close to \$650,000 in closed business — money collected and honestly earned — when COVID-19 shut down our event in March, just three damn weeks before we were to go live. A *whole year* of work gone.

But here we are. Hate it, resent it, get mad at it all you like — it’s not going to change the economy. All we can do now is adapt and change our approach, knowing that, at some point in the future, the wind will pick back up again and the effort you put in now will pay off even greater. Now, let’s talk about what to do.

3 Major Changes You Might Need To Make BEFORE You Start Marketing

When money dries up in a recession, as it has recently, there are three major decisions you need to make before you go gung-ho with a smarter, more sophisticated, and aggressive marketing approach. This is even more important right now, with certain industries being hit harder than others.

They are:

1. Change **WHO** you sell to.
2. Change **WHAT** you sell.
3. Change **HOW** you sell it.

For some of you reading this, the industry you focus on may have been decimated, making it essential to change **WHO** you sell to in order to survive.

One client of mine went from a solid million in recurring revenue to **zero** in a few short months because his predominant niche was hotels and event venues. You can’t collect money when they have closed their doors, have fired everyone, and aren’t answering their phones. **No marketing campaign is going to fix this.** If you’re serving a hard-hit industry like this, reread the last sentence again.

Often, clients (like the one I just mentioned) call me up looking for a campaign that will get the money flowing again. They want to know what they should be selling that will get



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their customers buying as they did before. It's the wrong approach. You can't get blood from a stone. **A bigger, more sophisticated bucket won't be any better than a broken-down old bucket at getting water from a dry well.**

Dozens of businesses outside of the IT industry are facing this, as well, and not just due to the shutdowns. Cities like Seattle and Minneapolis are losing businesses that had their buildings looted and burned to the ground; they're changing their "who" by moving to the suburbs or another city altogether. Nashville, the city I live in, has seen an uptick in people moving here from cities in the northeast due to the extensive shutdowns and restrictions put in place by their mayors and governors.

If all or a large percentage of your clients have been shut down and are not recovering quickly (such as entertainment, travel, and hospitality), then the only option — the smart option — is to quickly change your niche and start aggressively selling to another industry *if* you cannot wait it out.

The second major change you might need to make is to change WHAT you sell, providing an antidote to NEW problems or what ails them right now. For IT services, you'd be crazy to not rename and repackage your services to appeal to businesses that need to continue to help remote workers stay productive and secure. That might not be a "sea change" of services but a little tweaking and renaming.

The mouthwash TheraBreath is taking out full-page ads in magazines with the headline "Stop Mask Breath." Has anything changed in the product? Nope. But it's being positioned as the solution to a new problem. My dermatologist has successfully promoted treatments and bundled products to end the acne caused by wearing a mask all day. She's cleverly named it "maskne" to draw in new patients and get money flowing again.

When the pandemic shut down our event in March (Robins-BigSeminar.com), we didn't cancel it but changed the delivery to 100% virtual. We changed the **what**, *not* the **who**. That quick thinking allowed us to salvage a couple million dollars, not to mention the relationships with our sponsors and clients alike. It also allowed us to create a new service offering a virtual event platform that has taken off in sales not just to this industry but also to multiple industries outside of IT. (We're currently flooded with referrals from our clients who belong to various local industries that are looking for such a solution.)

I have a client who recently started selling a facial recognition technology that simultaneously 1) checks people into a building, 2) scans their temperature for a fever, and 3) checks to see if their face is covered with a mask. If those things aren't all in check, they are not permitted entry. He's selling it like hotcakes to schools that have a number of kids and people coming into the building who need to be scanned and checked in quickly. Of course, this product is not his long-term goal, but he's using it to generate revenue and get clients he can continue to sell to with the goal of evolving them into managed services clients. Very smart.

Should you *drastically* change what you sell? *Maybe*. You might just need to change how you are promoting what you already do.

Right now, money is flowing in IT, but it's only flowing for

what is considered essential or necessary to keep businesses running. If your service is viewed as essential, you just need to get it promoted to more prospects.

Overall, you want to also make sure **all** of your services are positioned and promoted to do one or more of these things:

1. Cut costs (outsourcing versus in-house IT staff, cloud, automation of legacy systems, etc.)
2. Reduce risk (cybersecurity, compliance, security of remote workers, etc.)
3. Increase productivity and operational efficiencies (Microsoft Teams, VoIP, remote workforce, monitoring of employees, etc.)
4. Increase revenue, profits, and/or provide competitive advantages (CRM, replacement of legacy systems that don't work out of office and/or require manual labor, etc.)

Since the shutdowns, many of my clients are crazy busy trying to fulfill on VoIP phone systems, Microsoft Teams, and remote workforce solutions to clients who have been forced to send employees home. These solutions are continuing to sell given that many businesses fear a second wave of shutdowns in the fall and winter, when flu season comes back around. Another hot seller is cybersecurity, or more specifically, secure remote workforce solutions.

I have also had a number of clients tell me they are getting sudden, random inbound leads of clients wanting to buy a managed services contract because their current MSP is failing to support them. This is the silver lining for many — the small, weak shops are going out of business.

We've seen a 500% increase in the smaller clients and prospects closing their doors. All have been sub-\$500,000 in revenue and are largely dependent on other micro-businesses delivering break-fix services.

Finally, change HOW you sell it. Another good thing that's come from the shutdowns is that many of our clients have discovered they can successfully close sales with new prospects and clients alike using Zoom and remote meetings. They are using webinars like crazy to generate leads, and they are successfully using content marketing to drive traffic and opportunities to their websites.

Many of our vendors struggled a lot with selling virtually early on. Their entire sales model was dependent on in-person event sales, something they repeatedly told us when we informed them of the event going virtual. As I've said elsewhere, the most dangerous number in any business is "one." One way to get clients, one way to generate leads. One good sales rep. One good tech.

When in-person sales events were no longer an option for the sponsors, they were forced to learn how to sell in a virtual world or go without the new clients. I'm happy to report that many who successfully made the change, like Galactic Advisors, Nerido, ID Agent, and Lionguard, actually did *better* at the virtual sales event than they would have in person, generating more leads, conversations, and clients. Others simply could not figure it out and suffered. They were stuck in one mode of selling.

Exactly How Much Of The Well Has Run Dry?

As I said earlier, you are going to have to work harder and with more intensity to get the same results in marketing that you were getting pre-shutdowns. Money is going to be parked for a while, and with the current unemployment rate at 10%, many businesses are not going to be rehiring or calling back workers or rapidly hiring — that impacts your managed services contracts due to the contraction of the workforce.

However, it has definitely not all dried up.

It might interest you to know that my clients who actually do marketing and report their KPIs to me — my Producers Club members — have seen their lead flow and new client acquisition go down 24%, active clients go down 3%, **but sales go up 7%**. Given that most of the MSPs in the industry are down or flat, that's solid.

Further, you should note that it's down by only a quarter and has **not fallen to zero**. One of the dumbest things I hear coming from people's mouths is the word "nobody" when discussing what they are actually seeing in the marketplace:

Nobody is in their office right now.

Nobody is answering their phones.

Nobody is getting direct mail.

Nobody is buying.

Nuts. We initially and temporarily saw a dip in leads and purchases for our flagship program, The Toolkit, back in March and into April. A few of my sales team tried the "Nobody is answering their phones and all the calls are going to voice mail" excuse with me. Since we track everything, and given that I don't come to conclusions based on feelings but on facts, I pulled a report and showed them we had experienced only a 2% increase in the number of times we got voice mail over the shutdown period versus all of last year.

Here's the truth: **You see what you expect to see.**

So, if you want to convince yourself that "nobody" in your area is in their office, answering the phone, reading their direct mail, or responding to marketing, you'll be exactly right. Worse yet, you'll do no marketing, no selling, and make no effort to combat the inevitable shrinking number of opportunities. Shame. I am reminded of Pogo's comment: "We have met the enemy, and he is us."

A Special Invitation: We are making a small number of passes to the Recession Rescue Roadshow For MSPs available to subscribers of MSP Success: [RecessionProofYourITBusiness.com](https://recessionproofyouritbusiness.com). To find out how to get a free ticket, send an email to ask@technologymarketingtoolkit.com and put "MSP Success Magazine Free Ticket" in the subject line. Tickets are extremely limited and will be made available on a first-come, first-served basis. ■

Robin Robins



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FROM HOMELESS TO THE MOST IN-DEMAND IT MARKETING CONSULTANT IN THE WORLD

HOW THIS FEISTY, 'NO-HOLDS BARRED'
REDHEAD EMERGES TRIUMPHANT AGAIN
AND AGAIN

SUCCESS FACTORS

***"Character cannot be developed
in ease and quiet. Only through
experience of trial and suffering can
the soul be strengthened, ambition
inspired, and success achieved."***

—Helen Keller

If you had met Robin Robins 30 years ago, you would never have guessed that one day, she'd lead the IT industry's most successful, respected, and fastest growing marketing firm for MSPs. But that's exactly what she did, persisting through extreme adversity and against all odds, forever changing the face of the IT industry with her Technology Marketing Toolkit. To understand the grit and fierce determination she has, you have to go back in time.

Homeless at 12 after her parents divorced, Robins was taken in by her mother's church: a nondenominational, "fire and brimstone" religious group that encouraged poverty, faith healing, and living by the strict rules of the Bible. For women, your greatest ambition was to serve God by finding and submitting to a husband and raising a brood of children. Education and "furthering" yourself were frowned upon, as was saving money, buying a home, or taking any initiative to improve your life. A faithful member of the church until she was 21, Robins scraped by and attended the church's school, which went through 10th grade but only taught to a seventh-grade education level. There was no diploma or career training — just basic math and reading.

After school, Robins cleaned houses, shoveled snow, worked in a flower shop, and did any odd jobs she could to help pay rent for the apartment she and her mother lived in. "I'm ashamed to say I stole bread from some of the homes I cleaned," Robins confessed. "It was devastating and demoralizing, but I was starving. I never stole anything in my life. I still cringe when I think about it." Without a car, she rode her bicycle to her cleaning jobs, even in the cold and often icy Philadelphia weather. "Occasionally I'd give in and buy a bus token, but that \$1.25 was enough money to buy something to eat or even an 'expensive' treat: a Dunkin' Donuts coffee."

At age 21, she finally escaped the church's grip. "Breaking free of that religion was one of the most terrifying and difficult things I've ever done," Robins said. "Unless you've belonged to a cult, you cannot begin to understand the psychological grip they have on you. I had no money, no home, no family to fall back on. The church was the only thing I knew, but deep down, I knew that this was all wrong."

Triumphing over what many would consider to be insurmountable odds, the struggle was far from over in both her personal and professional life.

Completely on her own, economic hardship was her reality until her late 20s. Initially, Robins took a job for minimum

wage as a secretary for a sales organization called Country Fresh Foods. Her big break came when the telemarketing manager was unable to show up for work one morning — and for an untold number of months — due to a "tax evasion" problem. Desperate for a sales "babysitter," the manager asked Robins to sit in the telemarketing room to monitor the reps and ensure they showed up on time and made calls.

"This was the first exposure I had to selling and earning a commission," Robins recalled. "After sitting there for a week, I got curious about whether or not I could do what they were doing. It paid \$5 for each appointment scheduled, and I could use the money ... So, I picked up the phone and start dialing."

Robins used every spare minute to improve herself. During a four-hour break between shifts, she would work out at the gym, then head back to the office to watch old VHS tapes of Zig Ziglar. "Between that and the help of the general manager, I got a taste for selling, and it turns out, I wasn't half bad at it," Robins said.

Robins also took a few free classes at a local community college on computers. Thinking that "getting into computers" would provide financial stability, she found a job fair for IT people, printed up a bunch of resumes, and went.

"My plan was to get a job working for an IT company in any capacity and then learn the business from the inside out," Robins said.

Despite having no computer skills, she landed a position in the collections department at CGI Systems by convincing them of her hard work ethic and eagerness to learn.

Once hired, she started teaching herself Lotus Notes, an application used throughout the organization and profitable services division of the company. After quickly writing a program to track all invoices and past-due money for the company, she was given the chance to be promoted into the company's computer training division as a sales rep. As an employee of that division, she was allowed to sit in on training classes for free. Her goal: "Tolerate" the sales job just long enough to get trained to be a Lotus Notes programmer or Microsoft Certified Systems Engineer. What actually happened, though, changed the trajectory of her life.

"I was selling like crazy and started making what I thought was insanely good money," Robins said. "It was around \$70,000 a year — nearly four times more than I had ever made in my life." Making more money than many of the programmers and engineers, Robins went all in, doubling

down on learning how to sell, buying books and audio tapes, and going to every seminar she could to learn how to get better. Before long, she was one of the top reps. After she was noticed by a Tennessee marketing firm that her manager hired to generate leads for their IT courses, she and her manager decided to start a division of the marketing firm in England to serve the European, Middle Eastern, and African (EMEA) market. Selling her car, quitting her well-paying job, and giving notice on her apartment, she left the U.S. to build a startup marketing firm based in Lemington Spa, England.

“It was a tremendous experience, and I learned a lot,” Robins said. “But the business and the relationship with my partner were total failures.” Returning state side after just one year, Robins hit rock bottom again.

“I had sold everything I had, given up my job, and had no money in the bank, so I had nothing to come back to,” Robins said. Starting over from scratch yet again, she took a job as a sales rep for the Tennessee-based marketing firm she attempted to start in England. Buying a car she couldn’t afford on credit, she packed what little she owned and drove from Philly to Nashville.

Again, she ran into problem after problem. The marketing firm she joined was not paying its bills and was cheating clients by not delivering the campaigns they’d been paid to mail. Distraught by this discovery yet unable to quit, Robins vowed to *never* be in this situation again.

“I’ll never forget that day,” Robins said. “I left work angry and frustrated to tears. I felt like a prostitute ... working for a man I didn’t respect, doing something I knew was wrong because I needed the money. I remember pounding on the steering

wheel of my car and shouting ‘I’m done with this s--t!’” In that moment, Robins made herself a promise she’s absolutely kept: to get truly financially free so she would never be slave to poverty and debt again.

Trying to find stability, she bounced around a few more jobs, one of which was for the motivational guru Tony Robbins. But in early 2002, the final straw came when she was fired from the last job she would ever hold.

“It was the first week back to work after the Christmas break,” Robins recalled. “The 9/11 attacks had everyone on edge, and no one was hiring.”

With no money, a mountain of credit card debt, and rent to pay, she started hustling for small marketing jobs. “I called everyone I knew and even a few I didn’t,” she said. “I got enough business coming in that I started to think I could actually work for myself.”

She figured out her niche — the IT industry — thanks to a project she did for CompTIA that led to securing multiple value-added reseller (VAR) clients. A rapidly rising trajectory, after just a few years, she had hundreds of clients and hired seven people to help her manage the fast growth. That growth revealed the next big lesson she had to learn: how to hire, manage, and build a solid team.

Within a period of six months, she got nailed by a series of setbacks that most businesses would not survive.

The first employee she had to fire for nonperformance took Robins’ entire client list to her competitor. When she filed for a cease and desist for a violation of confidentiality, they filed a counter against Robins for defamation of character as a counter-bargaining tactic — a claim that was later dropped.

“This first employee was a really bad egg that should have been fired much earlier, but I didn’t have the courage and hated confrontation, so I ignored a lot of the misbehavior,” Robins said. “But a bad employee is like a cancer. They never get better when ignored and end up destroying the attitudes of their coworkers and your culture.” This became public and caused a number of additional problems with other clients.

The next employee, a friend of the fired employee, up and quit without notice, angry that her friend was fired. Also disgruntled, a salesperson Robins hired repeatedly refused to make the calls she was hired to do, saying they were “beneath” her. Consequently, Robins had to let her go. In retaliation, the employee attacked Robins publicly, making false claims about what she was doing in the business, forcing Robins to get a lawyer involved. Another employee, who going through a tough personal time, was also failing to do her job. That was a friendly, mutual parting of ways, but still a hardship, since Robins’ staff was falling apart rapidly. As if that wasn’t enough, Robins discovered another employee stealing from her when petty cash went missing and the employee made personal charges on the company credit card. In all, 5 of 7 employees either had to be fired or quit.

Then, in a cruel plot twist, Robins was diagnosed with melanoma and suffered a miscarriage, all within that same six-month period. “It was, without a doubt, one of the darkest periods of my life,” Robins said. “It was all 100% my fault. But the good news is that hardship is a very effective teacher, and I learned lessons I’ve never forgotten that have served me to this day.”

Despite long hours, a grueling schedule to keep the business going, and facing enormous personal difficulties, she was determined to succeed. Fortunately, the melanoma was

caught in time and had not spread, and the employees were replaced with a stronger team, most of whom are still with her today. The business continued to grow. And the best news of all, Robins delivered the first of two healthy baby girls roughly one year later.

From those ashes, she’s gone on to build a solid, debt-free, high-profit, fast-growing, multimillion-dollar business that looks very different from the early days. She has mentored, coached and helped over 10,000 MSPs and IT services firms who have enrolled in one or more of her programs — a number that grows every year. She runs the largest C-level IT peer group, and her annual event is one of the largest in the industry. “Many of the vendors joke that joining my program is a rite of passage for small MSPs to grow,” Robins said. “One recently said they thought I was written into the journey of becoming an MSP; you get a PSA tool, and RMM, and then you join Robin Robins.”

Today, Robins’ company is not only the largest reseller of CRM and marketing automation systems to the MSP industry, but it’s also the biggest reseller of Infusionsoft in the world. Recently Robins launched Big Red Media, a marketing firm dedicated to helping vendors selling to the MSP channel through effective strategies and media to acquire new partners. She also launched Big Red Live, a virtual event platform “birthed” from her annual event, which became the biggest and most successful virtual event in IT history after she quickly pivoted from a live event to a virtual one in just a few short weeks due to the forced COVID-19 shutdown. This platform has taken off in sales, as organizations flock to Robins team seeking direction on how to deliver a successful virtual event.

Reflecting on the hardships she faced, here are insights into how Robins proactively turned adversity into triumph and how you can, too.

Don’t Retreat —Double Down

Everyone goes through periods of time where everything goes sideways at once. It’s during these times you must dig in even deeper and be courageous. “There are times when you think, I can’t even breathe. I’m so crushed. I’m so disheartened. I’m so frustrated. I don’t want to do this anymore,” Robins said. “You want to give up. In those moments, you ask yourself, ‘Why am I doing this?’ and second guess your choices and abilities. How you handle those moments determines whether you recover and grow or sink. Far too many hit that wall and retreat. Big mistake. Part of growing a business is being able to hold the line as you go through intensely difficult periods. But every time you push through, you get a little stronger and gain more skills and more confidence.”

Make Adversity Your Vitamin

Don’t try to make everyone happy. “Far too many business owners are bullied into timidity in marketing for fear of what others might think or say,” Robins fervently proclaimed. “When you’re running a business and making

tough decisions, you’re absolutely going to be met with criticism and opposition. People will try to undermine you and crush you, even well-meaning people who should be on your side. You must stand strong and be okay with being unpopular. You cannot run a business trying to keep everyone happy. You’ll end up making everyone mad or get nowhere fast.”

Be Grateful For ALL Experiences, Good And Bad

Don’t try and avoid the bad experiences, and don’t complain about how hard it is. Ever. Instead, change your mindset to expect problems and see them as an opportunity to get stronger and develop a clearer vision or learn a new skill. When you do that, you are better equipped to overcome problems faster, even in situations you’ve never encountered before. “I don’t have it all figured out,” Robins said. “No one does. I deal with all kinds of new problems every single day in business. But every problem I solve, every challenge I overcome, makes me smarter and stronger when it comes time to handle the next one.”

“One of my favorite Jim Rohn quotes is ‘Don’t wish it were easier; wish for more skills.’ Frustrations, setbacks, problems, and dealing with dishonest and unethical people is the daily walk of an entrepreneur,” Robins said. “You learn to have the strength to look those things in the face — not back down — push through, and figure it out because it will make you stronger. It’s also necessary for progress to happen.”

Embrace The Suck

“If you can learn to love the suck ... embrace it ... appreciate it ... everything gets easier,” Robins said. “True self-respect and confidence come from pushing yourself through tough times and from doing things you know others won’t do. Thoreau said most men live lives of quiet desperation. That’s 1,000% true, but the desperation doesn’t come from being buried in problems. It comes from running away from them, making excuses, and failing to do what you know you should do. You can lie to others, but you cannot lie to yourself.”



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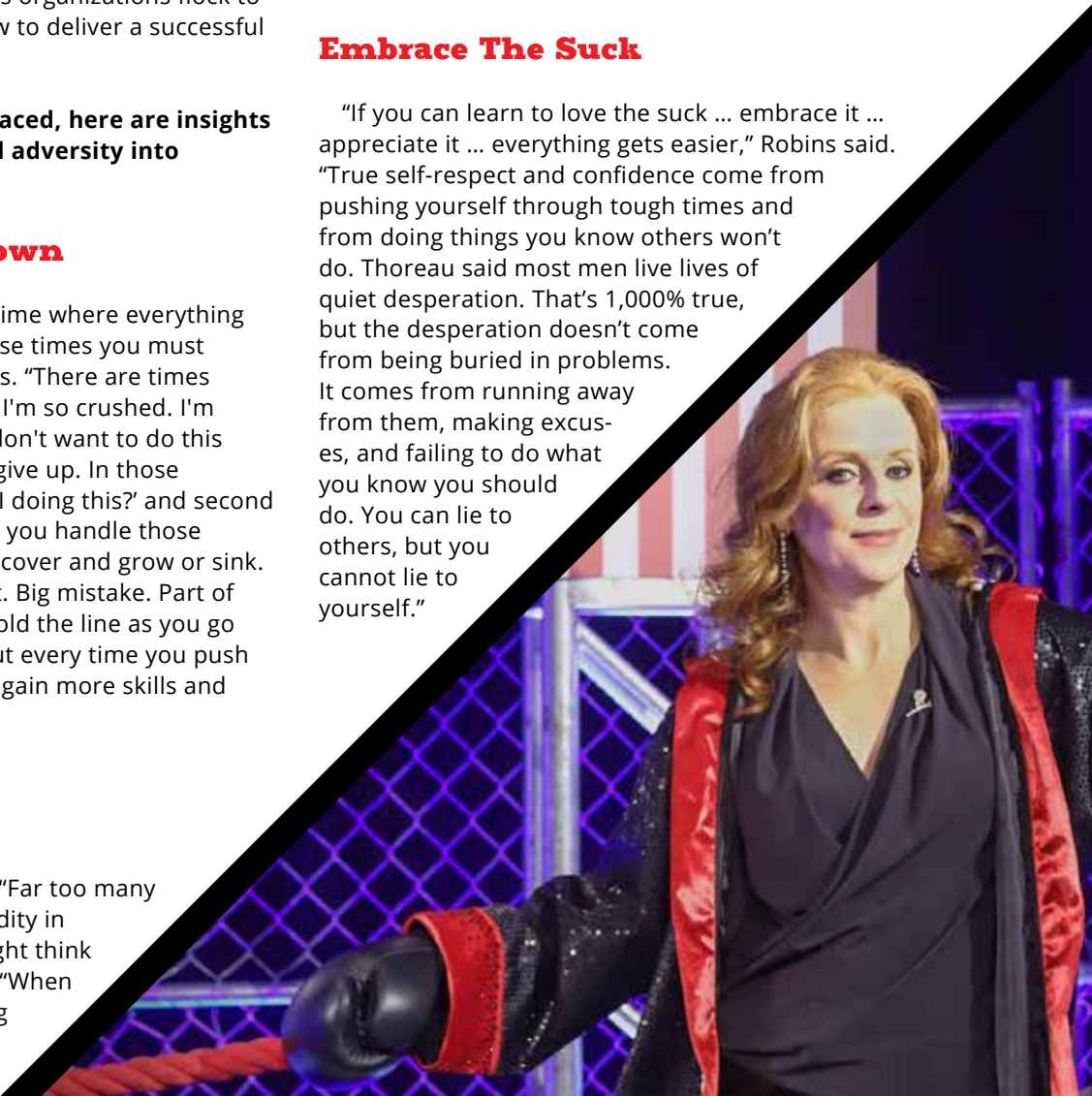
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Own It ALL

Certain things happen in a business that you can't foresee and that you don't deserve. Take the COVID-19 shutdowns as an example. It was no one's fault, and there was nothing any business owner did wrong, yet many paid a dear price and lost everything.

That said, as a business owner, you must take personal responsibility for what happens in your business.

"Three weeks before our big annual event was scheduled to go live, we were forced to shut it down," Robins said. "This was a disaster on many fronts and took a huge financial bite out of our hide." But Robins didn't roll over. She and her team quickly came up with a Plan B. Going virtual, she pulled off what many in the IT industry called the most inspiring and impressive pivot they'd ever seen, getting almost 5,000 attendees and rave reviews for the experience and content.

"At some point, you get to a maturity level where you stop saying, 'Why is this happening to me?'" Robins said. "As a business owner, problems are what you deal with on a day-to-day basis. It's like being a goalie in a hockey game, but with 12 pucks flying at you all at once. You better be ready. But remember, you signed up for the job, so you can't blame anyone but you," Robins said, adding, "The benefits of personal and financial freedom that come with running a business come with a price. That price is being willing to take complete and full responsibility for every bad thing that happens. Everything. If you can't accept that, you'll never succeed in business."

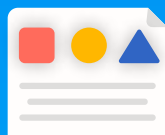
Make Sure Your Actions Support Your Spoken Goals

"I'm an amateur gardener," Robins said. "But as inexperienced as I am, I've never planted tomatoes and ended up with broccoli. Just like a garden, you reap in life what you sow. If you want something, you must get clarity on it, then make sure your daily activities support that goal. If you don't back up your goals with action, you're full of it. Stop lying to yourself and others."

Robins is crystal clear on why she is in business. "It is the financial freedom promise I made myself a long time ago that still drives me today," Robins said. "But I also get tremendous satisfaction and pride from overcoming so much. Running a business is like enrolling yourself in the toughest personal development seminar you'll ever attend." ■



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Learn more at adlumin.com/MSP.

Top 5 Podcasts Every MSP Should Listen To



The explosive popularity of podcasts shows no sign of slowing down, even as we commute less. Whether you're in the car, on your bike, at your desk, or on your couch, listening to a podcast is an effective way to multitask while gaining valuable business insights from industry experts and thought leaders. While there are thousands of tech and business podcasts to choose from, here are our top picks for MSP owners.

1



'ChannelPro Weekly'
ChannelProNetwork.com

Dissecting The Latest Channel News, One Week At A Time

The "ChannelPro Weekly" podcast provides news and insights for channel professionals, focusing on topics of interest related to the recent week in IT news. The (always) entertaining guest interviews with co-hosts ChannelPro technology editor Matt Whitlock and executive editor Rich Freeman make this broadcast worth the lengthy episode format.

2



'Connecting IT'
ConnectIT.com/podcast/

Your Pulse On The MSP Landscape

With a rotating cast of new IT services industry experts every episode, the "Connecting IT" podcast provides MSPs with concise insights and valuable commentary to build and grow your business while keeping you informed on industry trends and hot button issues and tuning you in to where the market is headed and how you can make the most of it.

3



'MSP Radio'
MSPRadio.com

The Voice Of Solution Providers

Dave Sobel, host of "MSP Radio" takes a vendor-agnostic approach and gives you a candid view of the latest news in the IT industry. His raw, well-informed commentary will help you stay up to date and in the know as you navigate your business and plan for your growth strategy.

4



'TubbTalk'
Tubblog.co.uk/
podcast/

The Podcast For IT Consultants

Whether you're an IT consultant, an MSP, or an IT solution provider business owner, "TubbTalk" shares valuable advice on how to be the best at what you do. Recent episodes have focused on productivity and topics such as how to outsource your NOC, SOC, and Helpdesk. The podcast will help you with valuable advice as you eavesdrop on host Richard Tubb's conversations with the IT industry's top thought-leaders.

5



'IT 4 Whiskey'
IT4Whiskey.com/

Build Your IT Business While Learning About Whiskey!

Here's a podcast focused on the secrets you can use to build your IT business, while learning about whiskey! Listen in as three IT industry veterans discuss the struggles of running an IT business (or any business, for that matter) and their passion for whiskey. Enough said. Listen and enjoy, ideally in front of a roaring fire.



The MOST Important Quality To Look For Right Now When Hiring



A few months ago, I hosted a private dinner in an undisclosed location with a dozen highly successful tech-industry CEOs, all running eight- and nine-figure businesses. Toward the end of the night (and after a few adult beverages), the conversation turned into a raucous debate about which team in the business was hardest to run: the tech/operations or the sales department.

Naturally, I sided with the "sales is tougher" camp. After all, finding people to do the work is always easier than finding people who can *sell* the work — just look at the dozens of smart, technically savvy MSPs out there who can fix just about any technical flaw and figure out the most complex problems but can't close a door with a handle on it. Of course, the "tech team is harder" side pointed out that finding a good tech — who can be counted on to consistently figure things out, who dots the i's and crosses the t's, and who is also personable and a good communicator when interacting with clients — is as rare as hen's teeth.

While there was good debate and many excellent points made, in the end, the consensus was that the sales team was far harder to manage for **one** single reason: the **drama**.

For starters, the majority of self-proclaimed "salespeople" out there are outright impostors, barely able to make a sale happen and often better described as *sales prevention*. They have no idea how to ask diagnostic questions, truly listen to what someone is saying, and ferret out objections (much less handle them), and they completely wimp out when it comes time to ask for the order.

If you are unfortunate enough to hire one of these folks, they often go into "victim" mode when you start putting some pressure on them to generate more sales. It's the economy. It's the competition. It's the time of year. Right now, they've been handed the perfect excuse with the pandemic causing shutdowns. If it's not that, it's that *you* aren't providing them the marketing they need. *You* aren't giving them enough leads. And if you're generating leads, you can bet they'll complain that the leads they are getting are "bad" or not qualified enough.

That's why it's more critical than ever to hire people who are **tough-minded**. Gritty. Fiercely determined to **win**. That must be the litmus test now. You can't afford to have a weak link on your team at any time, but now more than ever, you need people who are tough, resilient, and results-focused. You need someone who actually embraces the concept of "extreme ownership" (thank you, Jocko), not because you make it part of your culture but because that's who they are.

They aren't deterred by the word "no." They make "no" their vitamin. They aren't discouraged when they get sand kicked in their face and setbacks happen. They are unaffected by any unpleasantness; with blinders on and the heart of a champion competitor, they let it all bounce off them and move forward.

The real question is this: How do you determine if that's them in the interview? For starters, take a look at their track record and look for people who've been able to stay in a position for multiple years, ideally getting promoted along the way. I'm always nervous about people who jump around every one to two years; that's a sign they were good enough to keep their job for a year or two but not beyond that.

Second, give them a hard time in the interview. Challenge them. A hiring question I learned from Barbara Corcoran: Tell them you don't think they have the grit and determination that is needed to succeed in the position. Those with a fire in their belly will instantly handle that "objection." They won't roll over and just agree. Trust me, I've used this multiple times, and you'd be surprised by how many mealy-minded sales impostors will simply say, "Well, you're probably right." Bullet dodged. Another key area to dig into in their experience is how they stacked up against other salespeople on the team. Were they consistently the top performer? If not, why? Really dig in. You can learn a lot. Do they make excuses as to why they weren't No. 1 or do they take some ownership?

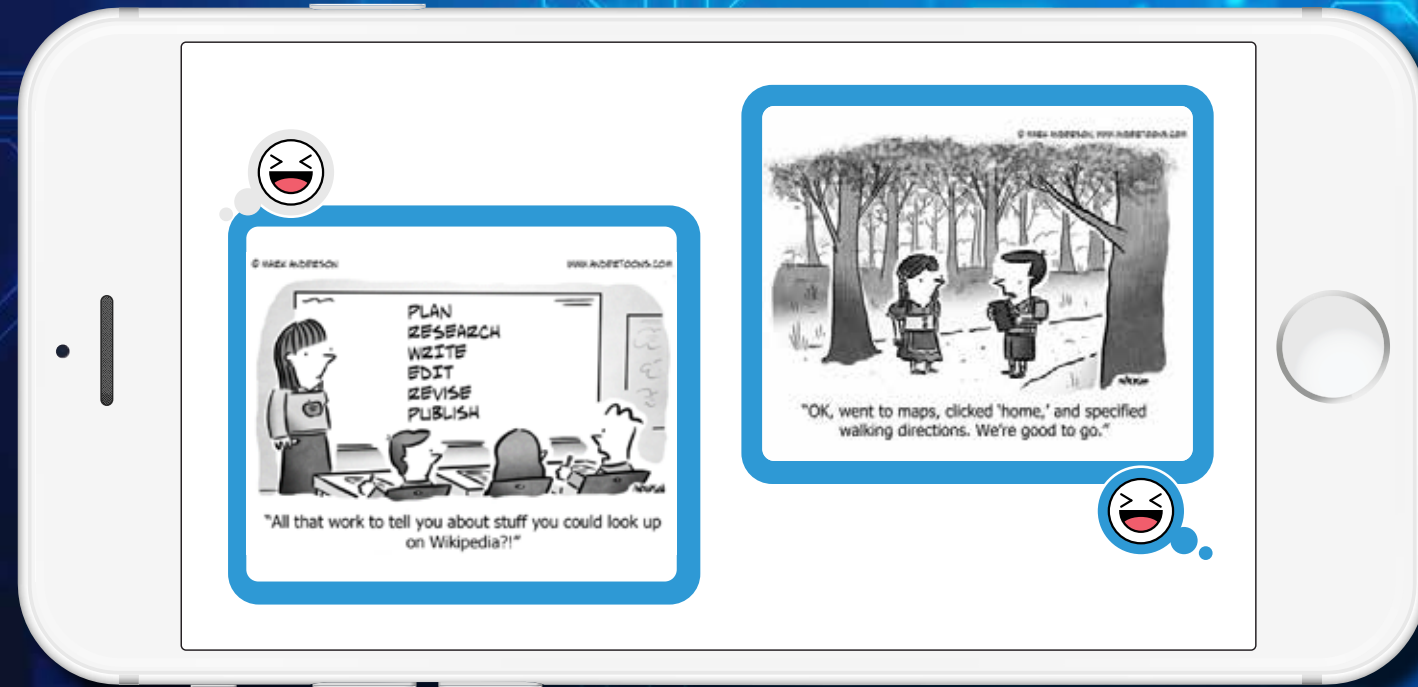
Just remember this: You can interview a person completely and thoroughly, put them through rigorous testing, and fact-check every claim they make in person and on their résumé and *still* end up with a dud. Jack Welch, easily considered one of the greatest corporate leaders of his time, was notorious for routinely firing the bottom 10% of his employees.

So, if you *do* happen to have one sneak by, at least be swift with the firing sword. ■



Robin Robins

HAVE A LAUGH



SCALING YOUR BUSINESS

THE DATA POWERING PREDICTION

At the heart of a leader's ability to predict the future is data — and lots of it. Yet, leaders also need human-gathered intelligence to get a gut feel for the market and what is happening in the company so that they can make the right decisions.

Intelligence-Gathering

Data analysis must be augmented with plain old human intelligence-gathering. For all the big data computing power that Walmart Stores Inc. possesses, it sends teams from the Bentonville, Arkansas, headquarters out to stores to gather insight Monday through Thursday, bringing them back Thursday night. Its habit of gathering data on employees, customers, and the competition started in 1962 with a 6 a.m. meeting every Saturday at Sam Walton's first store.

2 Lessons

1. Senior leaders need to be in the market 80% of the week, either figuratively or literally.
2. This routine must start on day one and continue through half a trillion in revenue!

Metrics Everywhere

When scaling our business, we start with the functions and processes driving the business, then push for the company to set goals, delineate measurable Brand Promises, and pick Critical Numbers on the One-Page Strategic Plan, including key performance indicators (KPIs) for both the people and process sides of the business so the leadership team has a balanced view of performance. The challenge is choosing metrics that matter — in other words, what's important to customers and provides sufficient insight to help both the leadership team and all employees see problems and opportunities in time to react.

Qualitative insights from conversations with the market and observations of customers and competitors also help fill out the data set needed to guide decisions. Input from advisors, experts, and "the crowd" also contribute.

Rockefeller Habit #5: Gather Employee Input

Without a formal routine to prompt members of your team to share their perspectives, you risk having those ideas walk out the door at the end of every day. Worse yet, your workers miss an opportunity to contribute and feel good about it.

Bring Every Brain Into The Game

At a minimum, we recommend that all executives have a start/stop/keep (15–45-minute) conversation with at least one employee weekly. Then, discuss these at weekly management meetings.

Here are three simple questions we recommend you use when holding these conversations:

- What should we **start** doing?
- What should we **stop** doing?
- What should we **keep** doing?

Ongoing Feedback

Collect weekly input from employees about obstacles and opportunities. Ask employees to submit suggestions that will:

1. Increase revenue
2. Reduce costs
3. Make something easier/better for the customers or employees

Close The Loop

Gathering employees' feedback and ideas will backfire on the company if management doesn't close the loop and act on their suggestions. Be transparent with employees. At a minimum, let an employee know why an idea can or can't be implemented (middle-management team members can help with this).

Rockefeller Habit #6: Gather Customer Input

We implore all executives and middle managers to have a 4 Questions (4Q) conversation with at least one end user weekly.

We suggest that leaders ask customers the following in person:

1. How are you doing?
2. What's going on in your industry/neighborhood?
3. What do you hear about our competitors?
4. How are we doing?

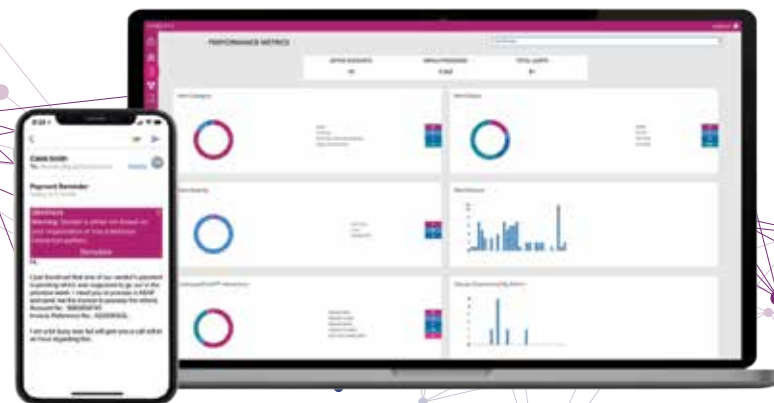
The key is to get them to talk about themselves, offer insight into industry trends in general, and help you cut through your own biases. Only after you've asked your customers these first three questions should you ask about their reactions to your offerings.

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Whichever competitor has the most market intelligence — and uses it — wins. Using powerful algorithms to discern correlations from users’ actions gives companies a great deal of insight. Much of this data also emerges from enticing customers to make comments and leave ratings for innumerable products and services online.

Again, Close The Loop

As you should with employee feedback, hold a middle-management team responsible for the process of closing the loop on all customer feedback.

Rockefeller Habit #9: KPIs For Everyone

Each team and person needs individual quarterly goals that align with the company’s clear plan for the next quarter. This creates “line of sight,” so every employee feels connected to the vision and direction of the company.

Did I Have A Great Day Or Week?

Every member of the team needs to be able to answer the question, “Did I have a great day or week?” Here’s the key: Each person must report on one or two KPIs weekly. Some companies use a whiteboard that gets updated daily (and discussed at meetings), and some use spreadsheets posted to the wall. Whatever you utilize, companies will succeed only if every team member looks at the information weekly and makes adjustments based on their KPIs.

One Critical Number And 3 To 5 Rocks

The magic of the Scaling Up process is getting everyone in the company to accomplish one additional thing that is aligned with the company’s focus every 90 days. And like the company, all employees or teams need to set a handful of priorities (known as rocks) that will help them achieve their Critical Number. When scaling our business, we strongly encourage companies to get an external coach (ideally, a Scaling Up Certified coach) to lead their quarterly and annual planning sessions and check in monthly to monitor progress. Everyone should also find a peer coach internally at the company. For more details, we have the link on ScalingUp.com.

Rockefeller Habit #10: Scoreboards Everywhere

Even if you’re seated in the nosebleed section of a stadium and can barely see the action on the field, you can always see the score. In this same way, have metrics, goals, and plans in a place where everyone can see them. Make sure that the core values, purpose, and priorities are posted throughout the company. It is important to track and manage the cascading priorities and KPIs. The end goal is to keep the output from the Growth Tools top of mind, like the score of your favorite individual athlete or team. ■

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We See 1 + 1 = 3.



"You have to see failure as the beginning and the middle, but never entertain it as an end."
-JESSICA HERRIN, FOUNDER AND CEO OF STELLA & DOT

"It starts with not having a hangover with the way things used to be."
-KEVIN PLANK, FOUNDER AND CEO OF UNDER ARMOUR



"If we tried to think of a good idea, we wouldn't have been able to think of a good idea. You just have to find the solution for a problem in your own life."

-BRIAN CHESKY, CO-FOUNDER OF AIRBNB



"ONE OF THE HUGE MISTAKES PEOPLE MAKE IS THAT THEY TRY TO FORCE AN INTEREST ON THEMSELVES. YOU DON'T CHOOSE YOUR PASSIONS; YOUR PASSIONS CHOOSE YOU."

-JEFF BEZOS, CEO OF AMAZON



"[Don't] let anyone convince you that your dream, your vision to be an entrepreneur, is something that you shouldn't do. What often happens is that people who are well meaning, who really care for us, are afraid for us and talk us out of it."
-CATHY HUGHES, ENTREPRENEUR, RADIO AND TELEVISION PERSONALITY, AND BUSINESS EXECUTIVE

"Ignore the hype of the startups that you see in the press. Mostly, it's a pack of lies. Half of these startups will be dead in a year. So, focus on building your business so you can be the one left standing."

- JULES PIERI, CO-FOUNDER AND CEO OF THE GROMMET



"When you are building a startup, it's difficult. Particularly, a startup that is expanding at the rate of Tinder. You have to give 100%, and you have to be committed. Solving the problem has to be personal, or else you're going to disintegrate."
-SEAN RAD, CO-FOUNDER OF TINDER, INC.

"If something is important enough, or you believe something is important enough, even if you are scared, you will keep going."
-ELON MUSK, CEO OF TESLA MOTORS AND SPACEX





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