



**Course: Core Standard Operating Procedures for Small IT Providers**

Course Number: 5W01  
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**DESCRIPTION:**

This course will cover the most important procedures you need to have in place to run an efficient and highly profitable Managed Services Business. Whether you're a new "Computer Consultant" or an experienced Managed Service Provider, you need to create successful processes that will propel your company forward.

This is an intensive webinar/teleseminar course over a five week period. All assignments are voluntary, of course. But if you want feedback on assignments, please complete assignments during this course and email them to the instructor.

Topics to be presented include:

- A practical introduction to SOPs
- The relationship matrix of SOPs
  - Clients
  - Employees
  - Vendors
  - Internal Organization
- The Ten Most Important SOPs for your IT Consulting Business
- SOPs management, organization, and updates
- Implementation strategies internally
- Implementation strategies for clients
- Service Department SOPs
  - Building
  - Training
  - Deployment
  - Upkeep
- Avoiding the biggest pitfalls with SOP development and deployment
- Building an Action Plan that works

One of the core purposes of developing SOPs is building a service delivery system that works well without the owner having to be involved in every little detail of daily operations. At the end, you will have a good start on SOPs for your business and a plan of action to make these changes take place.

## **Course Content Outline:**

### **Module 1: Introduction and Organization of SOPs**

- Mentality of Success
- Working ON your business
- Managing and Organizing SOPs
- Building an Action Plan

See Handouts, Worksheets, and additional Recommended Reading at [www.GreatLittleSeminar.com](http://www.GreatLittleSeminar.com).

### **Module 2: Managing Time and Money**

Themes:

- Manage Time Every Way You Can
- Defining What's Billable
- Staying Inside the Scope / Staying Profitable
- Working in Real Time

### **Module 3: SOPs Inside the Service Department**

Part One: Running the Department

- The Service Department is Central to Everything
- Organizing the Department
- The Hiring Process
- The Training Process
- Managing Technicians

**Module 4: SOPs Inside the Service Department**

## Part Two: Managing Service Delivery

- The Service Coordinator Function
- The Flow of Service Requests Into Your System
- Messaging the Service Board
- The Flow of Tickets Through You Service Board
- Using PSA and RMM Tools
- The TSR Log

**Module 5: Putting it All Together**

- Policies, Procedures, Personalization
- Policies: What's Important?
- The Pitfalls of SOP Development and Implementation
- Building an Action Plan
- Organizing Your SOPs
- Exceptions to the Rule