



# Worksheet Legend

**Technology Team:** Your team or business unit that is focused on a specific offering.

- For Example: Managed Security team

**Customer Needs & Goals:** Your customer's top priorities that your technology team can solve. These needs may not be explicitly stated from your customer, but ones you've identified from the problems looking to solve.

- For Example: Digital security

**Services Supplied:** The services you will supply the customer. The list should align to a company's needs/demands to meet or exceed their business goals.

- For Example: Threat Detection would be a key service you would supply a customer with Security needs.

**Processes:** The internal business processes that are needed to fulfil the demands of the customer and ensure great customer service. These must be created, documented, implemented and reviewed for continual service improvement.

- For Example: When an error occurs with the Threat Detection software, how is my team notified? How do they carry out the resolution of this? How is this communicated to the customer?

**Tools:** The tools needed to carry out the internal processes in the best manner possible. These are tools you may currently be using to run your IT service team, though you may need to add/edit.

- For Example: Connectwise Automate.

**Solutions:** The solutions needed to effectively deliver the services that you sell to your customers.

- For Example: Bitdefender is a solution that can be used for Threat Detection at a customer's location.

**Resources:** Any resources needed to carry out the work. Include quantity and any specific skills that may be required.

- For Example: My entire support team (4 employees) will be used when supplying the Security service to my customers. As the demand grows I may need to add an additional employee here.

**Knowledge/Certs:** The unique skillset or certifications needed to effectively manage and resolve issues that arise. Consider any industries that require you by law to be certified.

- For Example: Several industries require a CISSP (Certified Information Systems Security Professional).

**Vendors:** The sellers of the tools and solutions you need to roll out the Service. These include the direct purchase of tools, but also include distributors that sell the products you need.

- For Example: Because you have a relationship with ConnectWise, you can purchase Bitdefender through us and simplify the purchase/payment process.

**Relationships:** Any outside companies or individuals you rely on to create the best customer experience possible. Relationships with others in your field can be very helpful when expanding your product catalogue. Should also include companies used to outsource any of the day to day services.

- For Example: ConnectWise Consulting is a great way of finding valuable information about developing best practices when implementing a new service area.