The variety of services that managed service providers (MSPs) offer can range from the simple monitoring of IT networks to being responsible for all repairs, updates, and patches, as well as providing new software, hardware, infrastructure, cloud services, and staff resources. While solutions always need to be tailored to individual circumstances, the following three case studies demonstrate the different ways an MSP can help its customers achieve both profitability and peace of mind.

Each of these three companies had different challenges and different needs, yet each found an MSP that was a perfect match. Our first organization presents a cautionary tale of the consequences of incurring too much technical debt for too long.

WADE BALL

*Director, National Sales IT Services*

Wade leads the IT Sales teams across Canada and provides alignment between the Business Development, Account Executive and Go to Market teams to ensure trusted relationships with clients. With 25 years in the tech industry, Wade has helped clients strategically leverage the right technology at the right time.
CASE STUDY 1: WESTOBA CREDIT UNION

THE COMPANY
Westoba Credit Union (WCU) is an almost 60-year-old cooperative financial institution with approximately 200 employees, holding more than $1.3 billion in assets. From its head office in Brandon, Manitoba, it provides IT and network services to all of its 17 branches (including corporate office) across the province.

THE CHALLENGE
When Norman Neil, senior director, information and digital technology, joined Westoba Credit Union two and a half years ago, he inherited significant IT infrastructure challenges. With the banking landscape changing to more digital options, the current framework would not support where Westoba was heading strategically.
Neil was brought in to transform and create a functional system that could meet the organization’s needs today and in the future.

“As a credit union, our utmost concern is the safety of member data,” said Neil. “This transformation journey has brought us to a place where we are confident our data security is in great shape.” Neil faced a challenging network infrastructure, an antiquated call centre, and an aging phone system. Outdated productivity software added to the challenge.

Wade Ball, Director of IT Services with Ricoh says understanding technology is key. “Technology must support the company’s goals, and it starts with a clear understanding of the short and longer-term plans of the company, an assessment of the current technology, and the knowledge of the existing risks that must be factored into the project.”

THE SOLUTION

After a large network makeover that allows employees and customers province-wide access Westoba’s services reliably, Neil turned to other pressing needs. Whenever possible, his solutions revolve around the cloud and software as a service (SaaS).

“With an increased reliance on cloud solutions and services, the corporate network securing and connecting all locations and users is more vital than ever before,” says Ball. “Security and performance within the network infrastructure will allow the corporate data to be managed within the boundaries of the regulations, compliance, and governance expected.”

For the technology replacing the previous phone system, Neil and his team acquired a cloud-based voice over IP (VoIP) system with a call centre component. This proved invaluable when COVID-19 lockdowns began. As well as enjoying a 70 percent cost saving over the previous system, Neil said they were able to double the number of available agents within four days by training branch staff on the new system. The flexibility, analytics and simplicity the new phone system brings to the organization supports Westoba’s goals to be nimble.
For productivity, Neil chose to sign a Cloud Service Provider (CSP) Agreement, and the Teams implementation has been immensely valuable. Pre-pandemic allowed specialists who previously had to travel to distant branches for meetings to work with branch managers without leaving their desks, saving time and money. Once lockdowns began, it permitted staff to collaborate safely and continue to serve customers.

*Westoba recognized where the most significant risks were to the business and began a systematic approach to improve the use and security of innovative technologies,* says Ball. *With a focus on cloud solutions, Westoba was able to implement solutions and services for its corporation that allowed for a technology environment that supported users and their customers anytime, anywhere, from any device. The ability to qualify for collaboration and communication when the COVID-19 lockdowns occurred empowered the business and its customers to continue providing services safely and securely, saving costs by implementing smart solutions to support the current and future business needs.*

**ADVICE FROM WESTOBA**

Neil’s strategy for this transformation was straightforward: if there was a SaaS implementation of a product, that is the one option he explored. In selecting SaaS models, Neil said he has already cut his on-premise server load in half by doing so. But, he said, choosing the providers required some research and work to ensure the right fit.

*A technology partner must educate and enable their customers to help them make smart business decisions,* says Ball. *“Laying out the current state and future state goals, an IT Roadmap creates a prioritized list of initiatives for collaboration and action. Proper budgeting and planning can then be applied to ensure the business is investing in the right technology at the right time to support the needs and demands of their business.*

“When talking to vendors, I’m looking for partners that are invested and share in our strategic plan and roadmap for the organization. I am looking for companies who want to be a part of the organization’s IT successes and not ones that are just trying to sell something to make a sale, but something that brings us real value,” said Neil.
His advice is to ask questions. Especially around security, and if answers are not forthcoming, walk away.

Many customers are leading with two main priorities when building out their technology plan, says Ball. Security is at the forefront for all solutions to ensure the customer’s technology, assets, data, and users are educated and protected to the level of investment and risk profile defined. He says most companies are moving towards cloud solutions to maintain the agility and scalability needed to better manage their investment into systems and applications, allowing for lower operating expenses than more massive capital investments.

“It is a red flag if a provider says that answers to security and accessibility questions are proprietary information,” said Neil. “Even moving to the cloud, you can’t transfer responsibility for security.”

Neil is surprised at how much pushback he still gets. He advises asking how often and how security testing occurs, whether it is documented, and how frequently they audit. “Never be afraid to ask for proof of the claims vendors are making. These are large scale investments that have to provide value and are an integral part of your business.”
WHY YOU SHOULD CONSIDER A MANAGED SERVICE PROVIDER:

It frees up your IT staff: Rather than being bogged down with repetitive tasks and maintenance, outsourcing activities such as routine software patches and data backups allow internal staff to focus on more strategic, value-adding initiatives such as digital transformation efforts and enabling the core business.

End the break-fix cycle: Instead of only looking for help from a third party when there’s something you can’t handle in-house, you can let an MSP monitor equipment proactively and identify problems before they become a major issue. By providing ongoing support and maintenance, an MSP can help you avoid many IT-related problems before they happen.

Transition to the cloud: If you want to move more applications and data to the cloud, an MSP can help you plot a strategic path — even do an entire “lift-and-shift” without you having to make big investments in internal IT staff or disrupt regular business operations. They can also help you navigate the complexities and challenges that come with maintaining a hybrid environment, and identify the activities best moved to a cloud computing model, such as backup and recovery.

Increase your productivity and revenue: Your IT staff are more productive if they’re not distracted by having to do routine things such as backups, security, and routine maintenance. You’ll also improve your bottom line by moving to an OPEX model for IT rather than a CAPEX one, because your MSP has already made the investments in infrastructure you need to leverage.

Fill the skills gap: An MSP gives you access to a pool of talent you may be struggling to recruit and retain, or don’t require full-time, so you can tap into on-demand skills on a project basis without the upfront cost associated with finding and training people.

Stay compliant: An MSP can help you stay on top of regulatory requirements for your industry, and comply with privacy regulations such as the General Data Protection Regulation (GDPR). Look for MSPs that have undergone a third-party accreditation, such as ISO 9001 (for quality management systems) or ISO 27001 (for information security management systems), as well as business continuity standards.
CASE STUDY 2: MIRCOM

A client’s challenges are an MSP’s biggest opportunities. Many organizations do not implement change until there is some level of risk or pain, says Wade Ball, Director of IT Services with Ricoh. Typically, the challenge triggers the downtime of critical systems, the loss of applications and data, or a dramatic drop in end user productivity. These all impact a business’s ability to deliver its products and services to drive revenue and provide the critical, seamless customer experience required in today’s competitive marketplace.

THE COMPANY

Mircom is a Toronto-based global designer, manufacturer, and distributor of intelligent building solutions. Founded in 1991, its product lines include fire detection and alarms, emergency audio, communications, building automation, and security.
THE CHALLENGE

In September 2019, Mircom suffered a debilitating cyber-attack. All its servers were compromised, including its email server and its databases. It was a surprise — the company’s CEO admitted he was aware of the danger of cyber-threats but didn’t think Mircom was big enough for hackers to consider.

The challenge of recovery turned into an opportunity to revamp systems in a robust and more secure way.

*Waiting for an event that hinders the business operations and shuts down the technology that supports it is not an ideal plan. Preparing and maintaining a strategic IT roadmap with a clear set of initiatives, timelines, and budget can help an organization when they need to act quickly with technology changes, whether it is proactive or reactive, says Ball. Knowing your path with technology before severe, cost-impacting events occur does help save time when moving forward is essential.*

THE SOLUTION

“The catalyst to drive us quickly was really, really rapid recovery from a cyber-attack,” said CIO David Polsky. His first task was to get the business moving again, as quickly as possible. He did that by shifting everyone to Microsoft cloud applications: Office 365 (now rebranded Microsoft 365), hosted Exchange email, and Azure Active Directory authentication. “We knew that this was a great solution because once we recovered our servers and all of those PST files, we would be able to just rejoin them to the cloud-based service, and we’d have our email history,” he noted.

He also encouraged the adoption of Microsoft Teams, which turned out to be a timely initiative. With Teams, plus the other hosted solutions from Microsoft, Mircom was able to segue to work-from-home literally overnight, when the lockdowns went into effect.

“Mike Yankoo, manager of security and infrastructure, can take a lot of the credit for that,” Polsky, said. “He had built out such a good infrastructure in such a good footprint solution here that we didn’t have licensing, hardware, or bandwidth issues. A lot of companies struggled during those first couple of weeks in March when people had to work at home, but it was almost a non-event for us.”
THE MOVE TO MODERNIZE

“Every problem is an opportunity,” Jason Falbo, Mircom’s Chief Technology Officer observed during an ITWC webinar. “(The cyber-attack) made us take a hard look at what we needed to do to modernize with a hybrid cloud architecture to meet the needs of our company and our security position.”

For Polsky, that included taking a hard look at the company's licensing. The legacy Microsoft Enterprise Agreement (EA) partner was unresponsive (Yankoo said he didn't even know they existed until he’d been with Mircom for a couple of years; there had been zero contact from them), and since that agreement was about to expire, he saw an opportunity to consolidate its legacy licensing with the new licenses for the SaaS solutions.

HOW YOU MIGHT PAY FOR AN MSP

In addition to not having to make significant CAPEX investments in IT infrastructure, there is a lot of flexibility within the OPEX approach to MSP pricing when it comes to support and services.

Per-device pricing: You are billed a flat rate by the MSP for monitoring selected devices, desktops, and smartphones. The common fee structure offers predictability and flexibility as you can scale up and down the number of devices as needed, but it can get pricey as the number of employees and devices goes up.

Per-user pricing: Similar to the above, but rather by device, the flat fee is billed per end-user on a monthly basis, no matter how many devices each user has.

Tiered pricing: This popular pricing model offers packages of services at different price points. The more you spend on a package, the more services you get.

Value-based pricing: The price of a product or service based on the economic value it offers to customers.
When a client makes the decision to enhance their technology, and mitigate risk with a cloud-first approach, Ball believes that migrating to an on-demand, as needed, from-anywhere SaaS solution is a prudent choice. Your MSP partner must work collaboratively and in a timely fashion with the business and key personnel to develop a plan that targets the right steps at the best time to maintain operations — while minimizing risk, downtime, and productivity. The depth and breadth of the team’s speedy migrations is critical. Having a skilled, experienced, and certified partner to drive and support initiatives ensures the business, the key stakeholders, and the end users are working in lockstep when it comes to change management, training, and expected results.

**GO THE EXTRA MILE**

“(The incumbent) serviced us like, what's in it for them, and we really wanted a partner that would be looking out for us a little more,” Polsky said.

His two main selection criteria were service quality – especially speedy response to requests – and the depth and breadth of services offered. A third was the quality of partner that the provider would bring to the table when Mircom was shopping for net new products or services. When checking a provider’s references, Polsky recommended getting the reference to tell a story – not to just say “they’re great,” but to explain why they’re great.

**ALWAYS ALIGN WITH THE BUSINESS CASE**

*Technology in business is not a “set it and forget it” mindset or approach. With the rapid pace of technological change, the growth in cybersecurity threats, and an increasingly competitive marketplace, Ball says managing your technology investment is crucial.*

*Your MSP must provide regular status updates, and share relevant information on the services and solutions they are supporting. They should constantly be suggesting how to optimize services, save costs, and increase productivity, so you can stay focused on what you do best.*
You must understand the value technology adds to your business, and you must hold your partner accountable for the managed services they provide. Ball says businesses must challenge their MSP partner to match corporate goals and initiatives against real business outcomes. The final plan must align technology investment with cost management, efficiency, productivity, minimizing risk, an improved customer experience or navigating change.

“Our biggest worry was around whether we were going to get a really great level of attention during the sales cycle, and then limited attention during the operational phase, which is what happened with the previous EA partner,” Polsky explained. “I’m really happy to say that since we signed that agreement, we’ve been getting everything they promised us.”

**DELIVERING AGAINST PROMISES**

“They do quarterly reviews, where they look at what our profile is in terms of license spend, and is there a way to save money somewhere. They’re looking at optimizing our use of cloud services. We’ve had three different projects we needed some assistance on where they brought really good expertise internally to the table, and then brought in really good partners. So I think we established the right criteria, and we’ve made an excellent choice in our partner because they’ve been delivering against those criteria.”

Even if there’s no immediate disaster looming, companies can still profit from digital transformation to help them grow, including — as happened here — a shift to an MSP.
CASE STUDY 3: CYMAX GROUP

You need to rely on your MSP to be your partner in almost all aspects of the journey, from the strategic planning to the design and implementation of solutions to the ongoing management and support of technology systems for a quality end user and customer experience.

THE COMPANY

Cymax Group is a Burnaby, British Columbia-based organization that has grown from a small online furniture store in 2004 to a fully managed digital supply chain platform. Its brands include Cymax Business, Freight Club, HomeSquare, Muzeboard, and Channel Gate.
THE CHALLENGE

Cymax Group needed to migrate from being a furniture e-retailer to a fully-managed digital supply chain platform. This required both technical and organizational changes. Its siloed teams and ad hoc requests meant there was no sense of community or collaboration, and any processes in effect were inefficient. In addition, there was no single source of truth within the company – it needed to establish data-driven solutions.

More recently, the company also decided to adjust its governance and policy management.

THE SOLUTION

Beginning in 2015, Cymax Group began its digital transformation to increase efficiencies across the organization. The transformation followed Microsoft’s four pillars: engage your customers, empower your employees, optimize your operations, and transform your product, said chief executive officer Rizwan Somji. It spanned the entire company, and was as much about realigning the organization and company culture as it was about technology.

As we action transformation plans, and when we leverage Microsoft’s four pillars of engaging your customers, empowering your employees, optimizing your operations and transforming your product, we strive to match these with business outcomes. Ensure you measure success with metrics that tie into an improved customer experience, happy and productive end users, efficient and profitable operations with products and solutions that are in demand.

In order to action a successful transformation, the strategic efforts to plan and build an IT Roadmap is critical. You must include all key stakeholders from all lines of your business. Everyone uses technology today, so all must have a seat at the table for the collaboration, planning, and sharing that needs to occur to build a holistic plan that supports the entire business. Including more key stakeholders across more areas of your business will result in a more successful transformation, with an increase in participation from your teams. This IT Roadmap is not a static document. It must be reviewed regularly to ensure it meets your business plan and needs along the way. Your business and technology change more rapidly than ever before; so too must your efforts in managing and maintaining a relevant plan.
Choosing an MSP: How Three Organizations Made Their Choices

Many organizations today include their customers in the planning and transformation efforts, says Ball. Feedback from customers is critical, and there are lots of ways to measure their satisfaction. “Customer input into your transformation journey will not only give you unexpected insights but will also improve your retention level as they will feel valued.”

At Cymax Group, cross-functional teams were established to ensure issues were fully addressed, and IT was involved in day-to-day business to keep it abreast of needs. Developers were introduced to Agile Scrum methodologies, and were given standardized project management processes and tools such as JIRA and Confluence.

A data warehouse created the needed single source of truth, and upgrades to infrastructure such as email and Microsoft Azure hosting provided a stable foundation. Internal office systems had already made the migration before the COVID-19 lockdowns; Cymax Group was able to move to work-from-home with no interruption.

“You need to rely on your MSP to be your partner in almost all aspects of the journey, from the strategic planning to the design and implementation of solutions to the ongoing management and support of technology systems for a quality end user and customer experience,” says Ball.

A quality MSP will help you factor in any and all regulations and governance into your plan, allowing the business to make the best choices to manage compliance and risk.

**THOUGHTS FROM CYMAX GROUP**

“For me, having a good MSP is critical,” Somji noted. “It doesn’t matter if you’re a big or small organization, digital or not; it is really an extension to our team. It provides access to skills I wouldn’t necessarily have access to.”

Cymax Group and its longtime MSP have had their ups and downs, but Somji said they were always able to sit down and reset. He appreciated their support during difficult times, and acknowledged that the MSP had a big role in defining the new processes, and is still involved in creating Cymax Group’s roadmap.
“They're invested in our success,” he said, adding that policy management and governance and security management must move to the next level if the company decides to go public. Somji is relying on the MSP’s expertise to help build out infrastructure and policies, and on the team to accomplish this.

Your MSP partner MUST be invested in your company’s success, agrees Ball. A trusted and working partnership will allow for healthy collaboration, and discussions that will hold each party accountable for their efforts to transform the organization. “Challenge your teams to review in some form of cadence your strategic IT Roadmap, and how it empowers your business plan and needs,” says Ball. “Encourage the inclusion of your customers to provide another thoughtful approach to drive an increase in success.”

Somji insists the Cymax Group transformation is nowhere near over.

“I think we’re just at the beginning of the journey,” he said. “The initial steps were just getting all the table stakes up and available. So upgrading our email infrastructure, upgrading our Azure hosting infrastructure, upgrading our file systems, and making sure we have a business continuity plan and disaster recovery in place — these are all kind of table stakes for us.”

Three companies, three challenges, three solutions, and three MSPs proves that one size doesn’t fit all. Westoba needed a complete solution to help it retire crippling technical debt. Mircom’s MSP had the dual task of recovering from the cyber-attack and hardening the infrastructure to help prevent future issues. Cymax Group needed a digital transformation to serve its business evolution. Each found an MSP who could partner with it to create a working solution.

That’s the power of the MSP - it can provide as much or as little support as needed, both to serve its customers’ requirements and to accommodate their budgets. And as those needs evolve, the MSP’s expertise can continue to contribute.
QUESTIONS YOU NEED TO ASK AN MSP

In addition to all the answers an MSP needs to provide about their infrastructure, offerings and the value they can deliver, there are few other things you need to know.

What will the day-to-day be like? Any MSP you select should feel like an extension of your own IT department; the MSP will manage the day-to-day monitoring and response, but you will retain control over the policies and protocols followed. They can provide you with the option of access to a portal that supports day-to-day communication, project status updates, trouble tickets, and reports on service levels.

What reporting will they provide? Your MSP should be prepared to report on any defined SLA, including response time, notification time, accuracy of performing change requests, uptime of devices, availability of services or hardware. Your IT should be able to request daily reports such as managed intrusion protection results.

How strong is their team? Since the value of an MSP is its ability to fill skills gaps in your organization, you want a strong understanding of their bench strength and be assured their staff are constantly training and learning, and keeping up with the latest technologies through certification programs and overall career path for each team member.

How strong are their relationships with manufacturers and other vendors? Since you’re outsourcing a lot of CAPEX activity to the MSP, you want to partner with someone that has a good relationship with software and hardware vendors so they’re in a good position to resolve any issues that may come up. Give preference to MSPs who have formal partnerships with leading technology vendors.

Does their team fit well with your team? Cultural fit is critical and a must, even if an MSP ticks all the other boxes. Make sure your MSP is a right match for your industry and size, and that you won’t get lost in a sea of their other customers.

Ricoh can help. To learn more about Ricoh IT Services, click here. To speak to a Ricoh IT specialist, please submit your details here.
ABOUT RICOH
Since our beginning in 1962, Ricoh has been on the forefront of workplace innovation. Back then, that meant creating the first office fax machine, enabling people to work smarter, better and faster than ever before. Today, we’re empowering digital workplaces, which means connecting people to information, faster and more conveniently than ever before. Our digital workplace solutions can help you improve employee productivity, better serve your customers, and grow your business. As for tomorrow, that vision is already taking shape in our minds and labs. As digital workplaces continue to evolve and change the way we work, our imagination will continue to help you work smarter.

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ITWC is a privately-owned digital media and content services company. Building on over three decades of solid relationships with Canada's technology decisionmakers through award-winning excellence in journalism, ITWC delivers incisive, relevant information to executive and managerial audiences. It also provides leading, integrated marketing content strategies to clients, including over 200 global Fortune 1000 companies.

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