



MANAGED SERVICES:

TECHNICAL ACCOUNT MANAGEMENT:

The technical leadership that ensures successful managed services planning and delivery

April 2009

Table of Contents

Overview	1
The Technical Account Management Model	1

NOTE: The content provided in this Paper represents accurate and reliable industry and vendor specific information pertaining to generally recognized components that are deemed critical to the Managed Service presented. Neither SBT Partners nor its agents make any warranty, express or implied, as to the accuracy of the information or the opinions expressed. We shall have no liability for any errors of fact or judgment or for any damages resulting from reliance upon this information.

Trademarked names may appear throughout this report. Rather than list the names and entities that own the trademarks or insert a trademark symbol with each mention of the trademarked name, SBT Partners uses the names only for editorial purposes and to the benefit of the trademark owner with no intention of infringing upon that trademark.

Douglas Blumenthal, SBT Partners senior partner, has managed information technology engagements for small businesses for over 10 years. He shares his thoughts on the importance of the Technical Account Management function to the success of any small business managed services solution.

Overview

SBT Partners' role as a Managed Services Integrator implies that the small business IT annual plan, solutions roadmap, each managed services solution project plan, and the ongoing oversight of the solution's effectiveness remain independent of the support center. Clearly the best managed services come from global organizations that have developed support centers providing economies of scale and access to technical talent that the typical small regional or local provider cannot easily compete with. These service providers, however, do not sell their services directly to a small or mid-sized business. They work exclusively through companies such as SBT Partners.

Our infrastructure and support center partners provide first level monitoring and defense across the managed service solution. They do not manage the client relationship. Their purpose is not to develop a vision for IT growth that aligns with the client business strategy.

SBT Partners manages all aspects of the client relationship using an engagement model that is time tested, incorporating industry best practices to guide the client through planning and delivery.

The Technical Account Management Model

The Technical Account Management (TAM) function is critical to the success of the SBT Partners-client relationship. The TAM acts as the customer advocate to the support center once the solution is deployed providing ongoing oversight of services and ensuring that any issues that are not resolved within the center are managed in conformance with the Service Level Agreement. The TAM has access to every incident through the use of sophisticated online tools and remains in constant contact with the client when incidents occur, serving as the liaison between client and support center. The TAM coordinates the onsite delivery of highly trained and experienced technical resources when those resources are necessary to resolve a problem that cannot be resolved within the support center. The TAM is responsible for quality of service and client satisfaction.

All important technical communication flows between the client and the TAM. TAM involvement begins during the front-end phases of the client engagement through interaction with the client as the primary technical advisor. The TAM assists in the creation of the IT annual plan and roadmap, develops solutions and ad hoc project plans, and ensures project deliverables are achieved. The TAM is also the owner of the required Stabilization and Turn-Up Phase that occurs prior to the establishment of the link to the managed services partner's support center. All desktops, servers, and network appliances are assessed, upgraded, and installed with monitoring "agents" so that the support center can efficiently monitor the performance of the environment as well as identify, track, and resolve incidents. If the environment is stabilized properly, the managed services solution is optimized for success.

Finally, the TAM will proactively schedule regular client meetings to review the status of the annual plan. During these sessions the TAM reviews relevant metrics to ensure the plan meets the expectations created during the Stabilization and Turn-up phase providing statistics, service call data, reports, and remedies that have been or will be taken to meet SLA requirements.