



teammetallogic®
IT support that speaks your language

The Partner Manual

Your essential guide to getting amazing service & support from your Strategic IT Partner.



Mike Parfitt

 teammetallogic.com

Contents

\ A Quick Note From Mike	2
\ How Can I Get Support?	3
\ How Fast Will You Respond?	4
\ How Do I Escalate Something?	6
\ What Can We Help With?	7
\ Our Recommended Technology Platform	8
\ Your Contacts	9
\ How Do I Order Hardware or Software?	10
\ Some More Important Bits	11
\ In Scope vs Out-of-Scope	12

A Quick Note From Mike

Hello!

I'm Mike Parfitt, Founder & CEO here at Team Metalogic, and I lead your new outsourced IT team. I just wanted to introduce myself and the team personally and let you know that we're really excited to start helping you get the most out of your technology as your new strategic IT partner!

So, our mission is simple...

We're changing the way people think about outsourced IT and telecoms. Taking confusing tech speak and translating it into plain English. Keeping your business running with consistent, excellent service, doing what's best and never taking shortcuts.

Improving efficiency and saving you money.

You might think it's weird, but we honestly wake up every day excited to help businesses like yours better use all the innovative technology that exists out there!

As part of that, this short guide will arm you with all the information you need to get the most out of working with us.

I encourage you to take 5-10 minutes to read through it now so that when you do need our help – you'll know how to best get it!

We're looking forward to working with you!



Mike Parfitt

Mike Parfitt

\ How Can I Get Support?

The first question you might have when working with us is.. **How do I Get Support**, so here's our recommended ways:



By Sending Us an Email

The fastest way to open a new Service Request is to send an email to support@teammetalogic.com. This creates a Service Request immediately for us to get started on. You'll receive a reply within 5 minutes letting you know we have it and providing you with a Service Request Number so you can easily track progress.

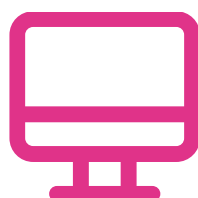
Make sure the subject line is descriptive (e.g., "Setup new user for Frank Smith") and put as many notes as possible in the body of the email to save us having to interrupt you to ask for more details.



By Calling Us

If your request is urgent or you'd like to talk to us, simply give us a call on 0345 521 0618 and choose option 2 for the Service Desk and we'll be able to grab all the details and enter a Service Request for you.

Bear in mind that while we'd love to be able to give immediate support over the phone, it's not always possible however any urgent or business critical requests should always be notified to us by telephone.



Using the Client Portal

You can also visit our client portal at portal.teammetalogic.com to add a Service Request or add notes to an existing Service Request.

You will also see all your other open Service Requests with us in here (and if you're the Primary IT Contact at your business, you can see everyone else's on your team as well).

If you need any help accessing the Client Portal, just shoot us an email at support@teammetalogic.com and we'll get you up and running.



QUICK TIP:

If you call our mobile phones or email us directly, it will most likely add an unnecessary delay as we don't monitor these anywhere near as much as we do our main Service Request system.

How Fast Will You Respond?

We are a **Shared Services** business model, which means you're sharing our whole team with the rest of our partners.

Whilst this is good as you don't have to invest huge amounts of money & time to build out and manage your own internal IT team, it means that we might not be able to offer immediate support for you for 100% of the time.










However, we know that one of the easiest ways to make you happy is to provide **FAST** and **RELIABLE** support when you need it most.

So to keep things fair, we categorise all issues into **Priorities** and work them in order. This means that when you have a **Critical** issue – we can work on it really quickly (by taking a little longer to work on your lower priority tasks).

Any issues raised with our Service Desk are prioritised according to the following triage matrix:

	URGENCY	IMPACT
High	Whole company is affected	Major business processes are sopped
Medium	Departments of large group of users affected	Business is degraded, but there is a reasonable workaround
Low	One user or a small group of users is affected	More of an irritation than a stoppage

From this, we'll assign your issue a priority level from P1 to P5:

URGENCY \ IMPACT	High	Medium	Low
High	 P1	 P2	 P3
Medium	 P2	 P3	 P4
Low	 P3	 P4	 P5

The priority level of your issue will determine our target response and resolution times as well as escalation procedures:

<p>Critical – P1</p> <p>Respond Within: 1 hour Plan Within: 1 hour Resolve Within: 1 Day</p> <p>Criteria</p> <p>Any major failure affecting an entire site / business or more than one device / server</p> <p>Escalation</p> <ul style="list-style-type: none"> • Immediate notification to Engineers • Escalation direct to 3rd line • Escalation direct to Incident Manager • Notification to senior management immediately 	<p>High – P2</p> <p>Respond Within: 1 hour Plan Within: 2 hours Resolve Within: 1.5 Days</p> <p>Criteria</p> <p>Incident affecting single, critical device / server</p> <p>Escalation</p> <ul style="list-style-type: none"> • Immediate notification Service Desk Manager • Incident Manager informed • Notification to Incident Manager 	<p>Medium – P3</p> <p>Respond Within: 2 hours Plan Within: 4 hours Resolve Within: 3 Days</p> <p>Criteria</p> <p>Normal service requests and incidents affecting non-critical device / server</p> <p>Escalation</p> <ul style="list-style-type: none"> • Notification to Service Desk Manager if SLA not met 	<p>Low – P4</p> <p>Respond Within: 2 hours Plan Within: 4 hours Resolve Within: 5 Days</p> <p>Criteria</p> <p>Low priority service requests and incidents with no impact on business operations</p> <p>Escalation</p> <ul style="list-style-type: none"> • Notification to Service Desk Manager if SLA not met
<p>Planned – P5</p> <p>Program updates, program installations, cosmetic changes, planned downtime, hardware upgrades, production of documentation...</p>			

But don't worry, we're pretty good at exceeding expectation and our actual response times are industry-leading. In fact, we're so proud of them, we publish on the front page of our web site every month!

How Do I Escalate Something?

Whilst we strive to exceed your expectations all the time, we understand it's not possible to be 100% perfect 100% of the time.

We are humans after all.

So, if you ever have a situation where you feel we're not handling your request as well as we could be, you can escalate that issue...

Here's the order of escalation contacts and their direct contact details:



ESCALATION CONTACTS	
1. Service Desk Manager	Name: Liam Torrance Phone: 029 2085 9044 Email: liam.torrance@teammetalogic.com
2. Technical Services Manager	Name: Craig Smith Phone: 029 2085 9042 Email: craig.smith@teammetalogic.com
3. CEO	Name: Mike Parfitt Phone: 029 2085 9041 Email: mike.parfitt@teammetalogic.com

As you'll come to notice, our team is extremely professional, highly efficient and very capable, so hopefully you'll never need to use this process.

However, you now know that if the rare occasion pop-ups where we do miss your expectations, there's an easy way for you to let us know so we can fix it ASAP!

If we ever do make a mistake, you can count on us to 100% own up to it.

\ What Can We Help With?

We're not just here to fix things when they go wrong. We want to develop a trusted, strategic partnership between our business and yours, here to support and advise you with most technology things related to your business.

Here's a list of some of the services we can help with:

- ✓ Office 365 / Microsoft 365
- ✓ Microsoft Azure & Cloud Hosting
- ✓ Hardware & Software Procurement
- ✓ Software Licensing
- ✓ Internet & Private Data Connections
- ✓ VoIP / SIP Trunking & Telephone
- ✓ Hosted Phone Systems
- ✓ Penetration Testing
- ✓ Project Planning & Implementation
- ✓ Procurement
- ✓ Procurement
- ✓ Cybersecurity
- ✓ IT Budgeting (create yours)
- ✓ IT Consulting
- ✓ IT Strategic Planning
- ✓ Disaster Recovery Planning
- ✓ Business Continuity Planning
- ✓ DNS / Domain Name Hosting
- ✓ Domain Name Renewals

Plus, we have a network of Trusted Partners for services like Accounting, Legal Services, Marketing and much more, so if you're looking for something not on this list – get in touch with us via your Account Manager to find out whether we can help you or point you in the right direction!

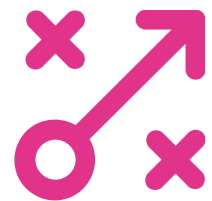
Business Improvement Projects

One of our areas of expertise is working out how businesses like yours can better use **technology** to solve **business problems**.

So, whenever you have a challenge in your business that you're struggling to find an answer for – simply pick up the phone and give your **Client Services Manager** a call.

There's a **VERY** good chance we'll be able to help you find a creative way to solve your challenge, often using a mixture of **business consulting** and **technology**.

We honestly **LOVE** solving challenges like this so we can help you be more profitable, more innovative and more efficient by using technology.



Our Recommended Technology Platform

We'd like to think we can help with everything.

However, the reality is, to be really great at what we do, we have focus on supporting a certain set of products and services.

We call this set of products and services our Recommended Technology Platform (or RTP for short).

We aim for all of our clients to use as much of our **RTP** as possible and we make sure we maintain deep knowledge and training on everything in our **RTP** so we can keep your IT Infrastructure nicely integrated, fast to support and world-class!

Plus, we 'eat our own dog food' by using everything on the **RTP** in our own business!



The Recommended List

- ✓ Microsoft 365
- ✓ Microsoft Azure
- ✓ Microsoft Servers
- ✓ Microsoft Hyper-V
- ✓ VMware
- ✓ Dell Servers & Storage
- ✓ Dell Desktops & Laptops
- ✓ Dell Switches
- ✓ HP Printers
- ✓ Ubiquiti Wireless Access Points
- ✓ Palo Alto Firewalls
- ✓ Trend Micro Worry-Free Security Suite
- ✓ Sentinel One Security
- ✓ TML Managed Online Backup
- ✓ Microsoft Office 2019 and Above
- ✓ Microsoft Windows 10 and Above
- ✓ TML Horizon Hosted Telephony
- ✓ Polycom IP Phones

Since we can't automagically update this physical manual in your hands, if you want to see the 100% latest up to date version of our **Recommended Technology Platform**, simply head to: <https://www.teammetallogic.com/insight/technologyplatform.htm>

Third Party Vendors

Whilst we work hard to stay trained and up to date in all of the above Technology, we know that from time to time, you'll need help with something that's not on the list.

When this happens, just bear in mind that it may take us some extra time to familiarise ourselves with supporting that product. But take solace that we are still world-class at troubleshooting other products, so we'll be able to work it out!

Also, please keep in mind that whilst we may be able to purchase items from other vendors that we don't list above, any support may end up being **Out of Scope** for your **Fixed Fee Support Agreement** and incur some extra costs.

We'll always let you know beforehand though.

Your Contacts

Your Client Services Manager

When your business starts work with us, we assign you a Client Services Manager

Your Client Services Manager is who you should call for any questions about your business and all account level discussions

Whenever you need to talk to someone about your future plans, your budgeting, upcoming projects or anything else related to your IT Infrastructure, get in touch with your Client Services Manager.

Your Client Services Manager will also be the person who will be working with you on your regular Technology Business Reviews (TBRs for short). More about them soon.

You can contact your Client Services Manager quickly and easily by simply e-mailing clientservices@teammetallogic.com or calling us on 0345 521 0618.



There's no need to get in touch with your Client Services Manager for helpdesk support or Service Requests as they'll simply tell you to get in touch with the Service Desk team directly for the fastest help and quickest response!

Your Primary IT Contact/s

As part of your Onboarding, we asked you to appoint a **Primary IT Contact** from your side (or sometimes a few).

Your **Primary IT Contact/s** are the ones authorised to make changes to your account and are who we send important information to.

If you're not the Primary IT Contact in your business, then it's best to speak to them whenever you have a request that includes adding / editing or deleting users or data as they'll need to authorise it first.

We have this security in place for your protection as we wouldn't want to give a new user access to your confidential data one day that they didn't have authority to access.

Your Accounts Contacts

If you ever need any help with any billing issues (such as needing copies of invoices etc), simply shoot an email to clientbilling@teammetallogic.com and our friendly accounts team will help you out.

You can also call them on 0345 521 0618 – they're available business hours, Mon – Fri.

\ How Do I Order Hardware or Software?

Whenever you need any new equipment or software, we've got you covered.

We have a dedicated procurement and ordering system designed to take the hassle and pain out of the process whenever you need to order anything.

Smaller Orders

If it's for a small order such as a few new computers or laptops – simply give us a call on 0345 521 0618 or shoot us an email to sales@teammetallogic.com and we'll send you back a quote. We aim to get all quotes back to you within 4 business hours.

Larger Orders

If your order is large or it's for a project (like a migration or office move), then it's best to speak to your **Client Services Manager** so they can make sure that they align everything up properly for you.

They'll work to get you an official Fixed Fee Proposal to cover everything you need!

Approving And Paying

Unless it's a complex project, we'll typically send you your quotes & proposals using our web-based quote delivery system.

You'll simply need to click on the link in the email and you'll be able to view the quote or proposal. You can simply click on the Approve button to submit the order.

We have a system in the back-end that alerts us as soon as an order comes through and we jump on to getting the goods ordered ready for you ASAP!

What About Out Of Stock Items?

If something is in stock, we'll normally be able to get it delivered to you within 1-2 business days.

If it is out of stock, our **Procurement Team** will keep you up to date with estimates on when it's due to arrive.

If our distributors tell us that it's going to be out of stock for a while, we'll work with you to find some alternatives (especially if it's something you need quickly).

Credit Accounts

Any purchases you make will be charged to your credit account with us up to the value of your credit limit. In order to maintain your credit limit we ask that you settle invoices by BACS within 30 days.

Some More Important Bits

Here's a few more important bits of information to help you better understand and navigate the crazy technology world and some of the terminology we may use when we're talking to you!

Security vs Usability

In the technology world, there's an ongoing battle between **Security vs Usability**.

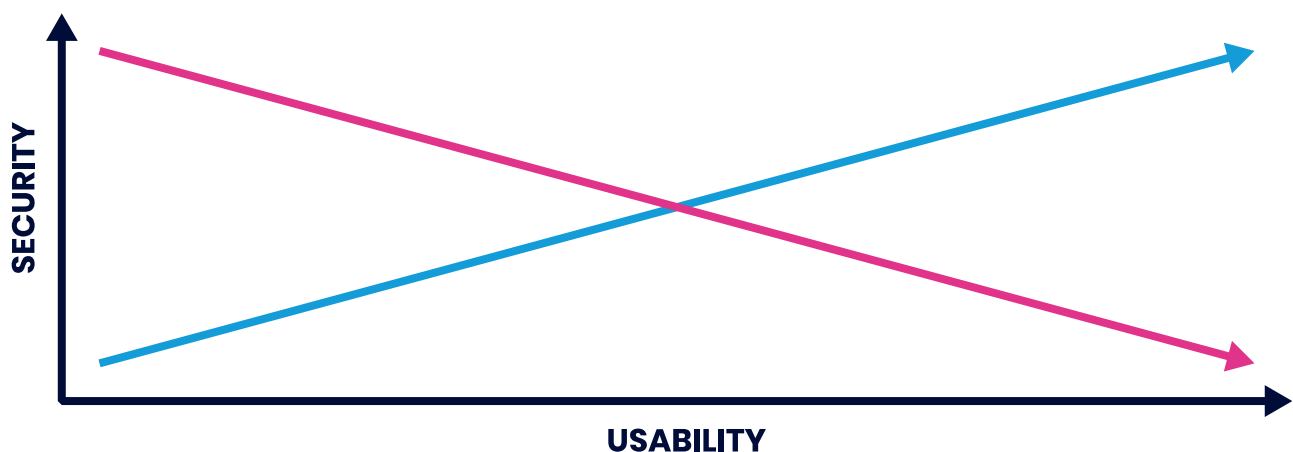
Every day, there are millions of hackers around the world, trying to break into networks like yours. There are literally high-rise buildings full of these hackers in countries like Russia.

And, the best way to defend against them is to **NOT** use technology at all.

But that wouldn't be fun, right?

The problem with technology though is that typically, the more **secure** your systems, the harder they become to use!

On a graph, it looks a little like this:



So, please know that we do our very best to make your business as secure as we can with the budgets you give us to work with. And, at the same time we also try to make things as easy to use as possible, while keeping security as high as we can.

You might notice this in things like our strong recommendation that every single user uses **2-Factor Authentication**.

We know it can be painful to use because we protect 100% of our systems with it.

However, turning it on, can help block LOTS of the most common hacking attempts that are happening on your network to help keep your data safe.

We err on the side of high security, but we also aim to for easy usability.

\ In Scope vs Out-of-Scope

If you've ever been to an All-You-Can-Eat Buffet, you'll know that you're able to eat as much of anything that's out on the buffet as possible.

However, if you'd like something that's NOT on the menu – then you have to **pay for it separately**.

Our Fixed Fee IT Agreements and Fixed Fee Projects work in the exact same way.

That means, that you can have as MUCH as you like of anything that we cover in our **Inclusion List** for your Agreement or in the **Scope of Works** of a Project.

(just like you can eat as much Sweet 'n' Sour pork on the buffet)

And, when you need something that's not on the list, we will simply quote you a separate **Fixed Fee Quote** so you can work out whether you want to go ahead with it or not.

We call this whole conversation **IN-SCOPE** and **OUT-OF-SCOPE**.

And, whilst we have worked hard to build an offering where pretty much everything you will need in the day-to-day operation of your business will be included **IN-SCOPE** – you might find from time to time that there will be things that are **OUT-OF-SCOPE**.



If you're unsure if something's included or excluded, either check your **Inclusion List** on your **Agreement** or simply give us a call!