

CompTIA[®] COMMUNITY UK & Ireland

Welcome

Regional Group Meeting
26 June 2024, Birmingham



WE ARE THE
CompTIA
COMMUNITY



Estelle Johannes

CompTIA Community
Regional Group Team

ANTITRUST	DIVERSITY	ANTI-HARASSMENT
<p>You must not engage in discussions that could result in an unreasonable restraint of trade.</p> <p>connect.comptia.org/about-us/antitrust-statement</p>	<p>We promote an inclusive environment that respects and values all individuals.</p> <p>connect.comptia.org/about-us/dei-policy</p>	<p>This is a respectful and safe environment for all. Any verbal, physical, or psychological harassment will not be tolerated.</p> <p>comptia.org/contact-us/harassment-complaint</p>

Please report any violation of the above policies to CompTIA staff immediately.
Violators will be removed from the event or meeting.

Antitrust, Diversity, and Anti-Harassment



Networking

Member-led communities, councils and events that help tens of thousands of executives and professionals learn and collaborate with peers.



Education

Vendor-neutral education, business standards, technical content and career advice to help drive company and professional growth.



Thought Leadership

Highly regarded research and subject-matter expertise covering workforce developments, emerging technologies and business trends.



Certification

Vendor-neutral certifications that help millions of IT professionals around the world validate their skills and advance in their careers.



Philanthropy

Help for those who are under-represented in IT and those who lack economic opportunity to prepare for, secure and succeed in IT careers.

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MJ Shoer
Community



Eiddris Fakir
Membership



Estelle Johannes
Regional Groups



Kris Nagamootoo
Membership



Katrin Giza
Regional Groups



Sam Ross
Marketing

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Jason Moss
Certifications



Marie Cronin
Certifications



Sophie Stocking
Marketing



Leila Reshadi
Revenue
Enablement

CompTIA Community Highlights

April

- ASEAN meet ups in Malaysia, Singapore & Bangkok
- Managed Services Interest Group: Marketing Masterclass Part 2 of 3
- Interest Group: Breaking the Glass Ceiling Benelux
- Interest Group: Objection handling Q&A

June

- UK & Ireland Spotlight Awards
- Emerging Technology Interest Group: Cutting Through the Hype: Practical Applications of Generative AI
- Advancing Women in Technology (AWIT) Interest Group
- Diversity, Equity & Inclusion Interest Group: Overcoming Challenges and Embracing Adversity
- Cybersecurity Interest Group: I Bought Anti-Virus – I'm All Sorted! Aren't I?

May

- Benelux Regional Group Meeting, Utrecht
- Managed Services Interest Group: Marketing Masterclass Part 3 of 3
- Cybersecurity Interest Group: Compliance as a Service
- DEI Interest Group: Understanding Menopause: A Guide for Everyone



Certifications



Login

Join Now

Connect

Membership

Resources

Events & Education

Newsroom

About Us

Home / Connect / Advisory Councils

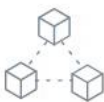
Industry Advisory Councils

Industry advisory councils are comprised of influential and knowledgeable leaders in their respective technology domains. Each advisory council serves to advocate and educate with a mission to accelerate the adoption of emerging technologies into businesses small and large. In addition, they develop innovative content and tools to help integrate these technologies into existing solutions that solve critical business problems. Advisory council positions are by invitation only.



Artificial Intelligence

As artificial intelligence integrates more into business, the AI Advisory Council develops strategies and resources to create, deliver and support AI initiatives that accelerate success.



Blockchain & Web3

The Blockchain & Web3 Advisory Council identifies the trends and opportunities and develops valuable resources to help businesses adopt blockchain technology.



Channel Development

The Channel Development Advisory Council, made up of executives from across the industry, shares its expertise and experience to develop programs, tools, and other IT channel resources.



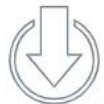
Data

The Data Advisory Council focuses on data literacy and training, data analytics, business intelligence to drive decision-making and improve performance, and establishing and maintaining a data governance framework.



IoT

The IoT Advisory Council provides vision and guidance in matters relating to the creation, delivery and support of initiatives that accelerate internet of things adoption.



SaaS Ecosystem

With the growth of SaaS applications, the SaaS Ecosystem Advisory Council develops new business opportunities and tools that demonstrate value for these technologies.



Workforce

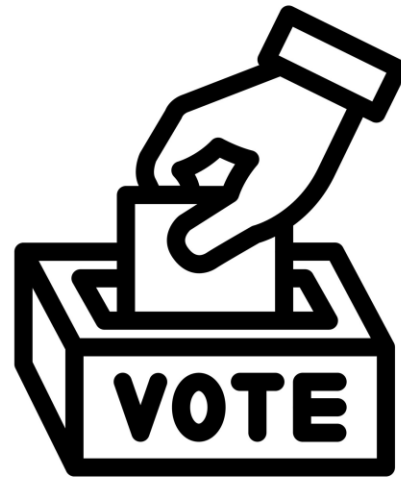
The Workforce Advisory Council focuses on addressing IT workforce challenges and raising awareness of workforce development and the career opportunities available in the tech industry, particularly among underrepresented groups.



CompTIA[®] COMMUNITY UK & Ireland

- **UK&I Cybersecurity Interest Group Meeting** In-person
- **Regional meeting** in Manchester in March
- **Genius Café** at Manchester in March – circa 20 members assisted 1:1
- **2024 Spotlight Awards** – record number of entries, up nearly 20% on last year
- Hosted **15 interest groups** across the 5 areas of Advancing Women in Technology, Cybersecurity, DEI, Emerging Technology and Managed Services

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UK & Ireland



<https://forms.office.com/r/jEuaPgPU2T?origin=lprLink>

TOP MEMBER CHALLENGES

09:00 – 09:30	Registration, Breakfast and Networking
09:30 – 09:45	CompTIA Welcome
09:45 – 10:00	CompTIA Community - UK & Ireland EC Update
10:00 – 10:30	State of the Channel EMEA/UK & Ireland Research and Fireside Chat
10:30 – 11:15*	Protecting Your Crown Jewels *FIRE ALARM TEST AT 11.15
11:15 – 11:30	Networking Break

AGENDA

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Dan Scott

ConnectWise

Chair

CompTIA Community – UK & Ireland



Hollie Whittles

Purple Frog Systems

Vice Chair

CompTIA Community – UK & Ireland

North America
Community

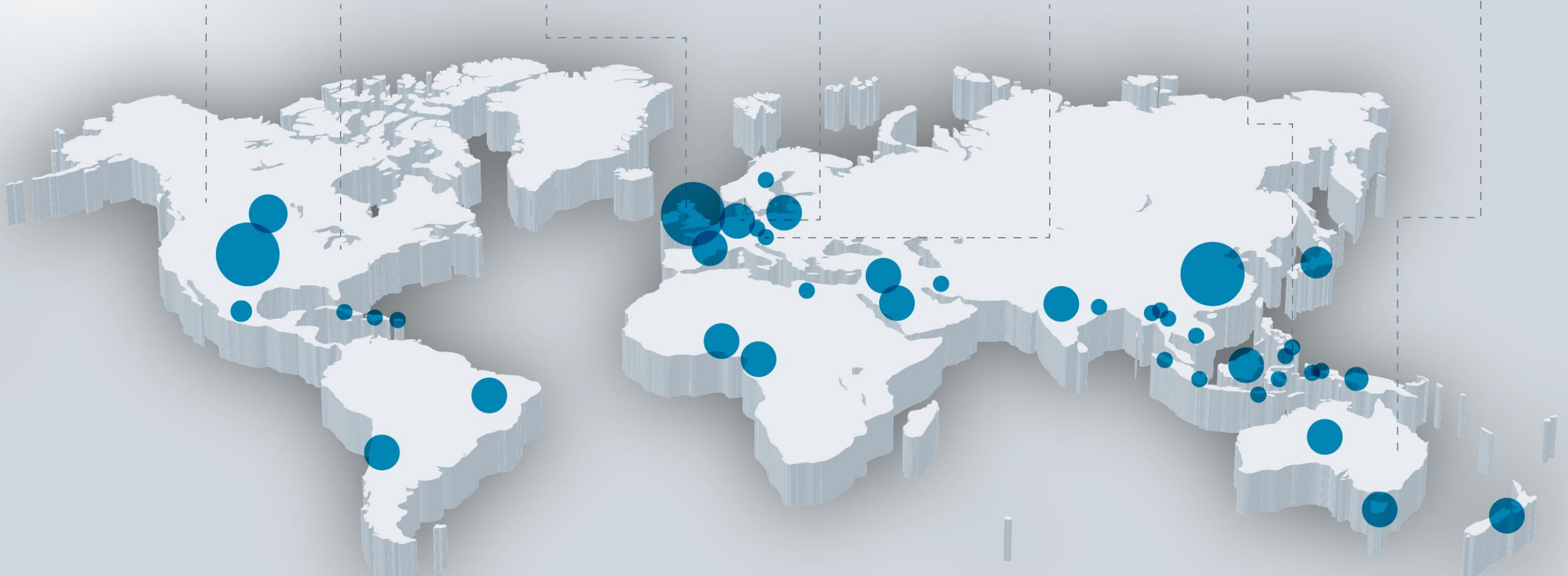
UK&I
Community

Benelux
Community

DACH
Community

ASEAN
Community

ANZ
Community



Global Reach of Our Member Community

REGIONAL GROUPS

CompTIA. COMMUNITY North America	CompTIA. COMMUNITY UK & Ireland	CompTIA. COMMUNITY Benelux	CompTIA. COMMUNITY DACH	CompTIA. COMMUNITY ASEAN	CompTIA. COMMUNITY ANZ
Canada United States	England Wales Scotland Northern Ireland Ireland	Belgium The Netherlands Luxembourg	Germany Austria Switzerland	Brunei Darussalam Burma Cambodia Indonesia Laos Malaysia Philippines Singapore Thailand Vietnam	Australia New Zealand

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OUR MEMBERSHIP ACROSS THE GLOBE

Regional Groups	Interest Groups	Industry Advisory Councils	Cybersecurity Programs
<p>ANZ Australia and New Zealand</p> <p>ASEAN Brunei Darussalam, Burma, Cambodia, Indonesia, Laos, Malaysia, Philippines, Singapore, Thailand and Vietnam</p> <p>DACH Germany, Austria and Switzerland</p> <p>Benelux Belgium, the Netherlands and Luxembourg</p> <p>North America United States and Canada</p> <p>UK & Ireland</p>	<p>Advancing Women in Tech</p> <p>Cybersecurity</p> <p>Diversity, Equity & Inclusion</p> <p>Emerging Technology</p> <p>Managed Services</p> <p><i>*Interest groups vary by region.</i></p>	<p>Artificial Intelligence</p> <p>Blockchain & Web3</p> <p>Channel Development</p> <p>Data Advisory</p> <p>IoT</p> <p>SaaS Ecosystem</p> <p>Workforce</p>	<p>ISAO Executive Steering Committee</p> <p>Cybersecurity Trustmark Working Group</p> <p>Cyber Global Task Force</p> <div> <p>Member Leader Groups</p> <p>CompTIA Community Global Taskforce</p> <p>CompTIA Community Regional Group Executive Councils</p> </div>

MEMBER ENGAGEMENT OPPORTUNITIES

Executive Council

CompTIA
COMMUNITY

UK & Ireland



Paul Croker
Astrix



Olivia Donnell
Quest Software



Robert Gibbons
Aabyss Ltd



Ian Groves
Start Tech



Greg Jones
Kaseya / Datto



Jason Kemsley
Uptime
Solutions Ltd



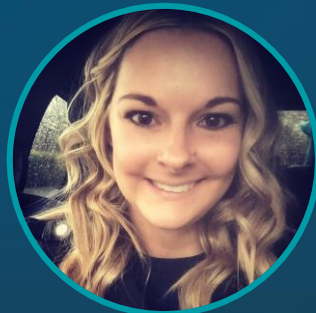
Hannah Lloyd
inSOC



Tracy Pound
Maximity
CompTIA Board
Chair



Scott Riley
Cloud Nexus



Lizzie Robinson
Pax8 EMEA



Dan Scott
ConnectWise
CompTIA Community
UK & Ireland Chair



James Steel
Salesbuildr



Hollie Whittles
Purple Frog Systems
CompTIA Community
UK & Ireland Vice Chair

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Executive Council
Expression of Interest



Register Today
EMEA Member and Partner Conference
London 21-22 October 2024



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Jason Kemsley

MC

Uptime Solutions Ltd

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Tracy Pound
Maximity Ltd



MJ Shoer
CompTIA



CompTIA®

State of the Channel 2024 UK & Ireland





Key State of the Channel Stats

\$1.5 trillion

Estimated spending on IT services globally in 2024, an 8.7% growth rate year-over-year to place as top segment of technology spending for the first time.

(Source: Gartner, January 2024 projection)

58%

of UK & Ireland channel firms say their business is in better shape today than it was two years ago

47%

of UK & Ireland channel firms say competition and pricing pressure concern them most as top inhibitors to revenue growth and profitability

53%

of UK & Ireland channel firms say they plan to sell generative AI-based solutions to customers in 2024

49%

of UK & Ireland channel firms cited training and certification as the main remedy for improving business skills

33%

of UK & Ireland channel firms say they participate in zero to four partner programs today

40%

of UK & Ireland channel firms describe their company as “expert” in terms of general business acumen

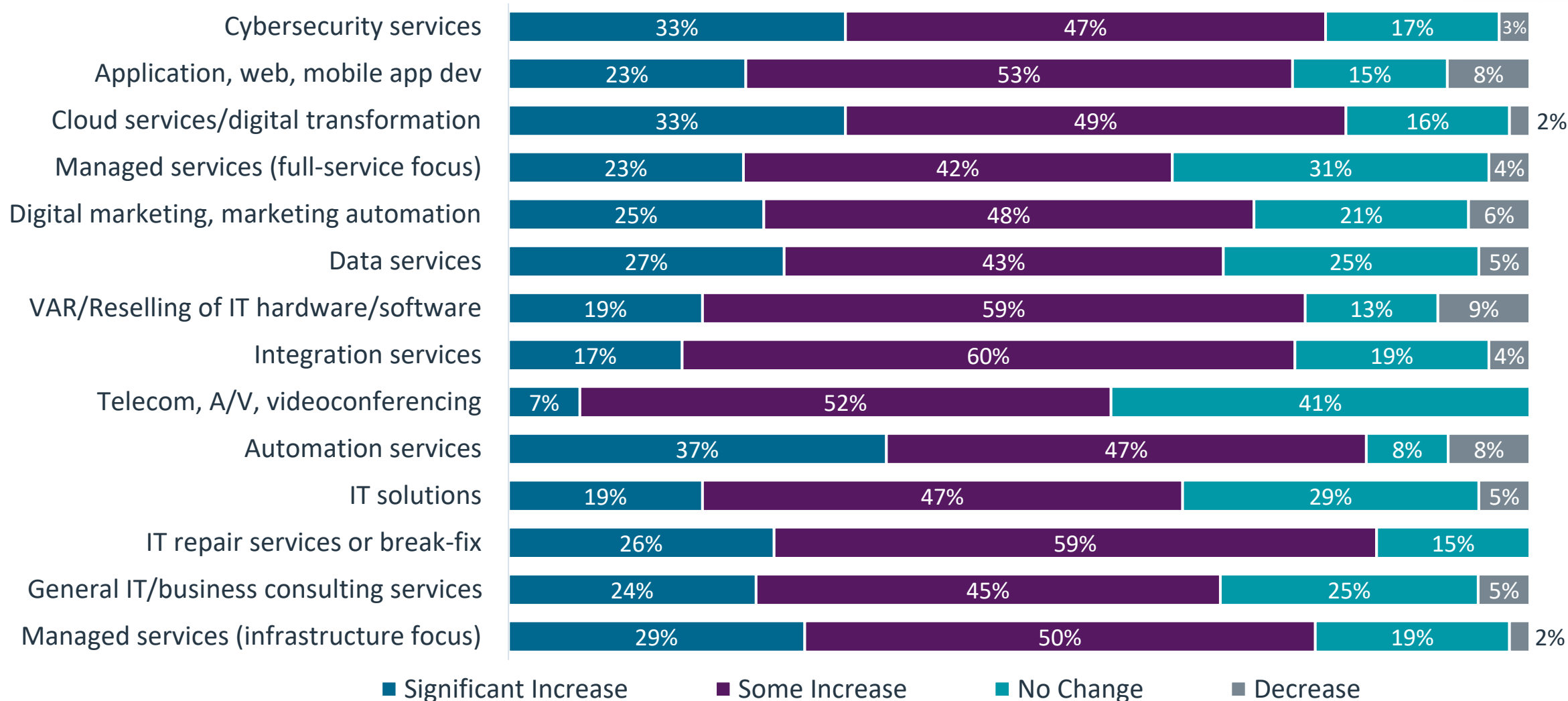
Top Priorities in Maintaining a Relevant and Future-Oriented IT Channel



	Australia & New Zealand	Benelux	ASEAN	UK & Ireland	DACH	North America
Top Positive Opportunity	Availability of generative AI tools & solutions	Availability of generative AI tools & solutions	Availability of generative AI tools & solutions	Technology's growing complexity creates demand for expertise	Technology's growing complexity creates demand for expertise	Technology's growing complexity creates demand for expertise
Top Negative Development	External factors (i.e., global economy, inflation, interest rates)	External factors (i.e., global economy, inflation, interest rates)	Competition from online marketplaces & non-traditional players (i.e. prof services firms)	Competition from online marketplaces & non-traditional players (i.e. prof services firms)	External factors (i.e., global economy, inflation, interest rates)	External factors (i.e., global economy, inflation, interest rates)

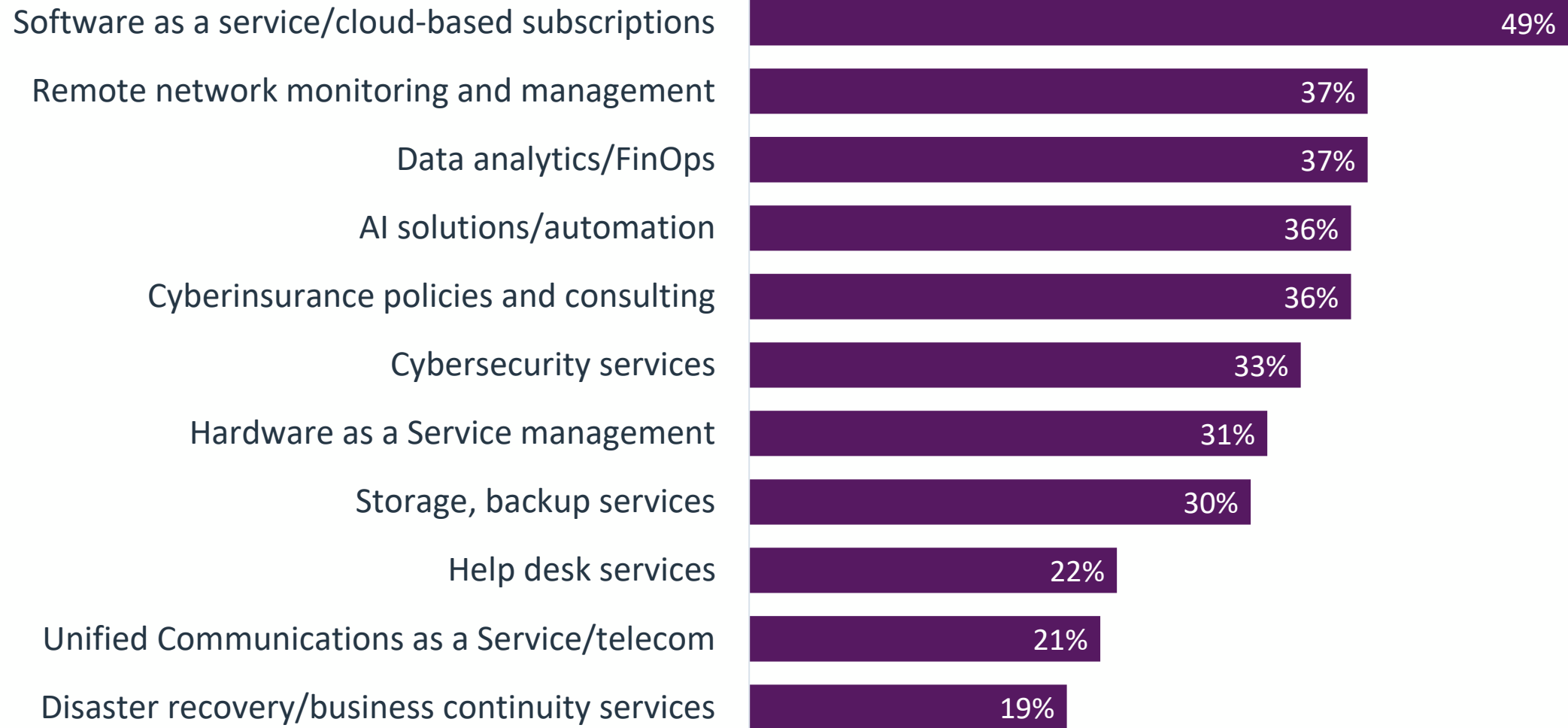
Channel practitioners will fill their to-do list with items ranging from how to embrace new technologies like AI; handle new types of competition and market changes; capitalize on new and more sophisticated services opportunities; optimize and improve internal business functions and better serve customers and the workforce.

Profit Margins Expected Over Next Two Years





Most Requested MSP Services



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Adam Pilton

Cybersmart

Protecting your Crown Jewels



CompTIA
COMMUNITY
UK & Ireland

REGIONAL MEETING



26.06.2024



Birmingham | West Midlands



CompTIA UK & Ireland

Introduction

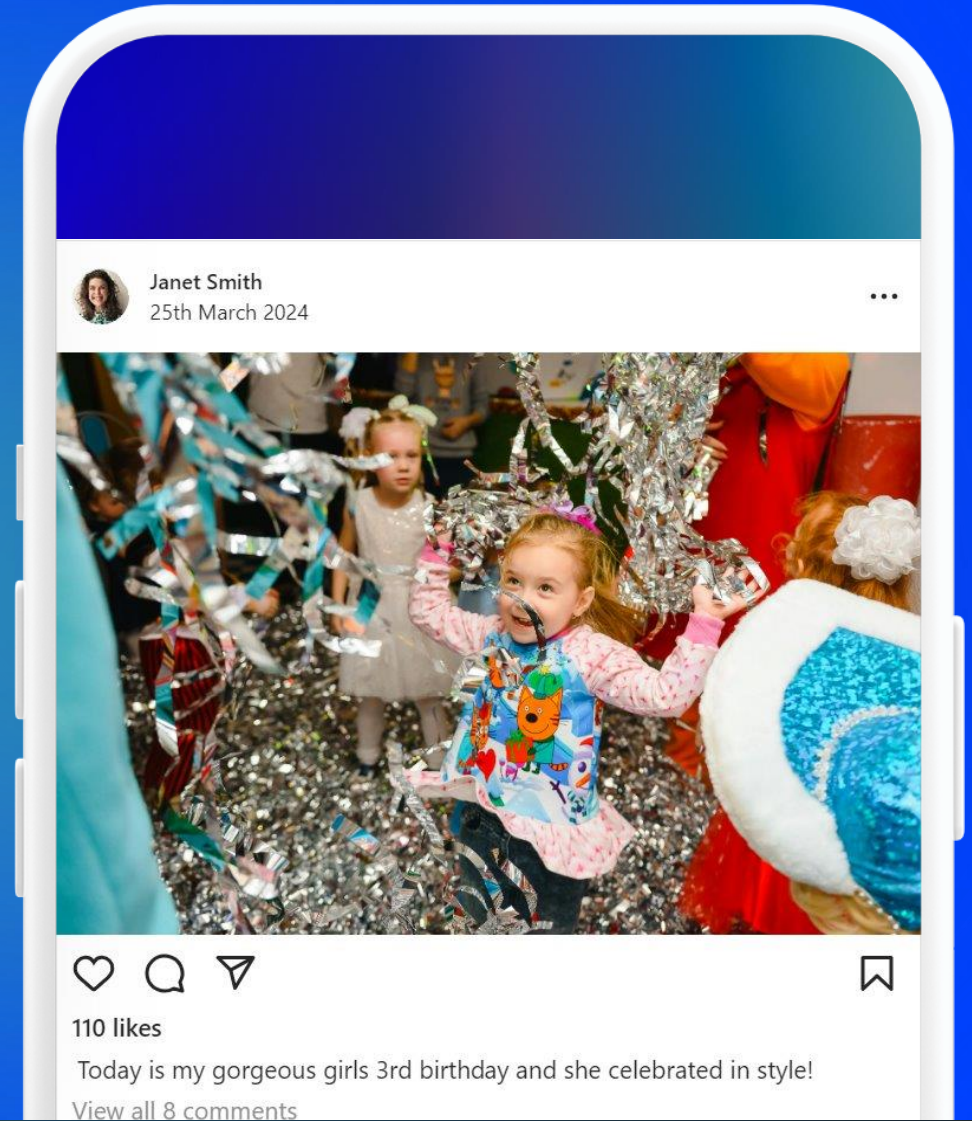


Adam Pilton
Senior Cybersecurity Consultant

Agenda

Prevention
Culture
Strategy
Criminal Cases

We are continuously giving information away



Welcome

Shop millions of live events, discover can't-miss concerts, games, theatre and more - all with secure and effortless ticketing.

Create an Account

Already have a Ticketmaster Account? [Sign In](#)

Email Address

Password

 SHOW

First Name

Last Name

Country of Residence

Post Code

☐ Hear about what's coming up. (Including news, exclusive presales and offers - by email, SMS, etc)

By continuing past this page, you agree to the [Terms of Use](#) and [Purchase Policy](#) and understand that information will be used as described in our [Privacy Policy](#).

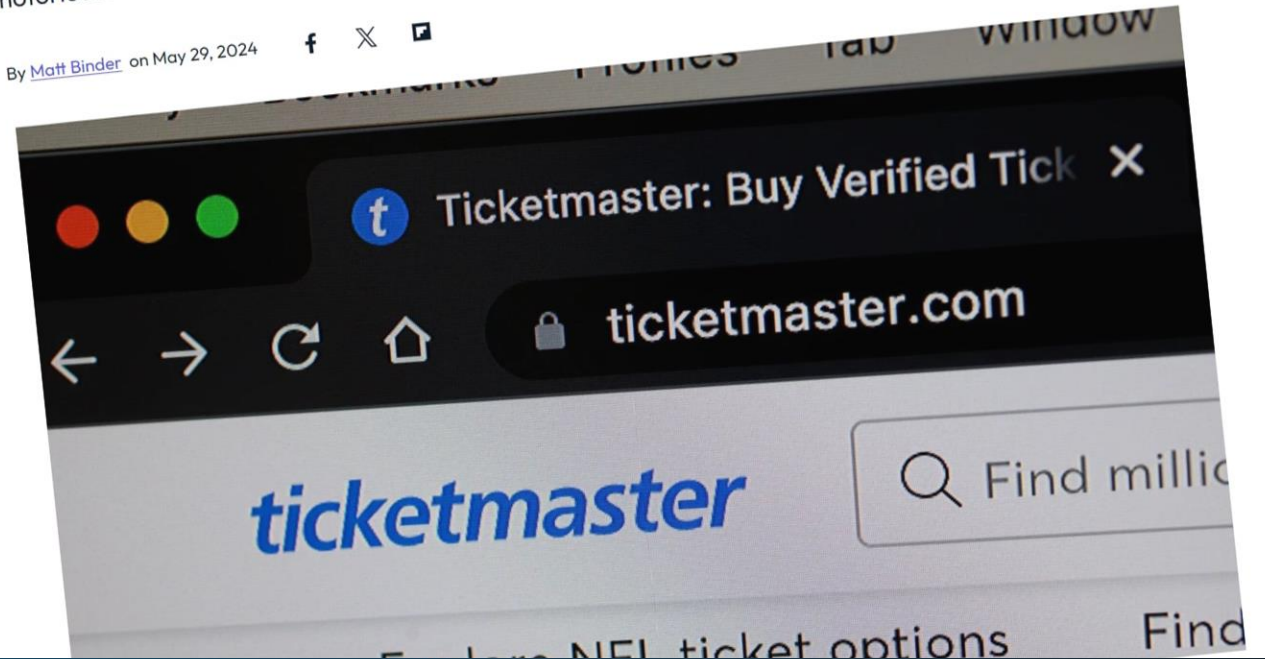
Next

Sign-Ups

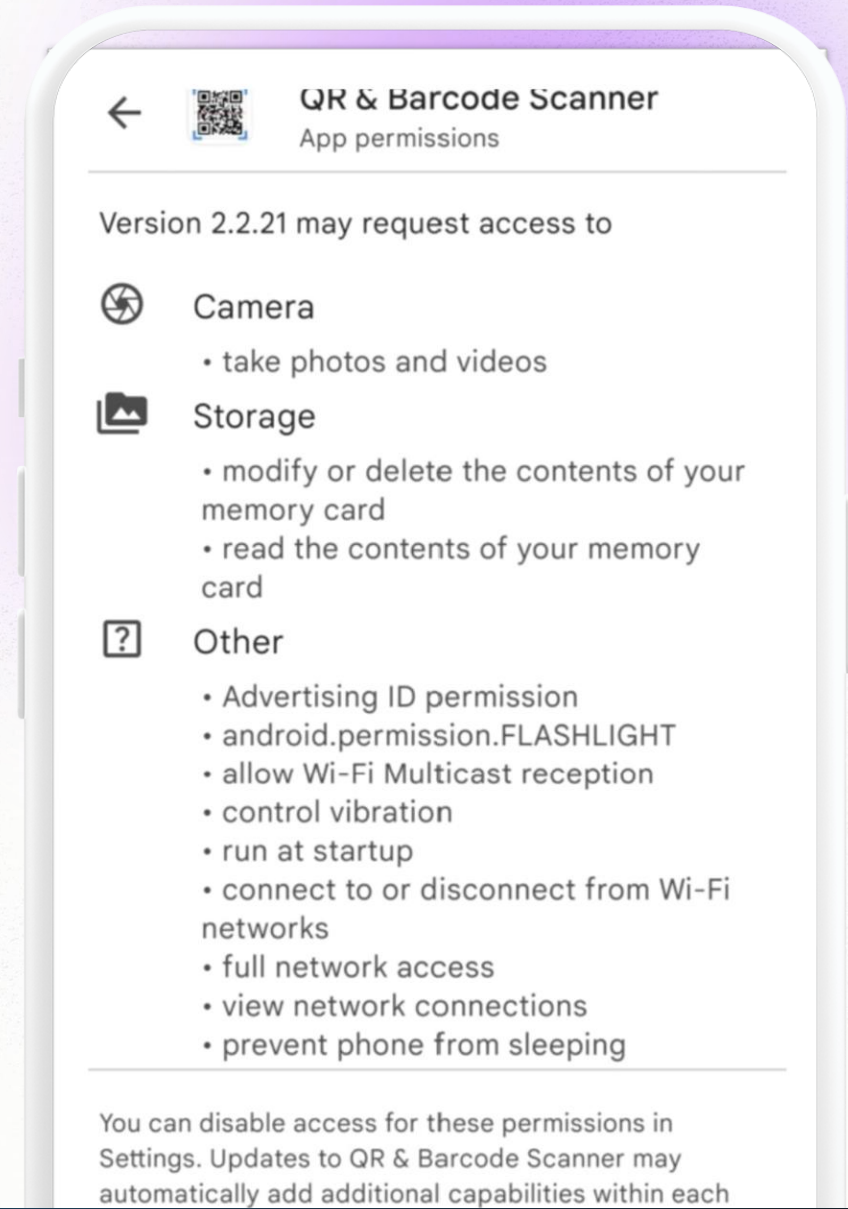
Ticketmaster hacked. Breach affects more than half a billion users.

Emails, phone numbers, addresses, and even financial details have allegedly been exposed by a notorious hacker group.

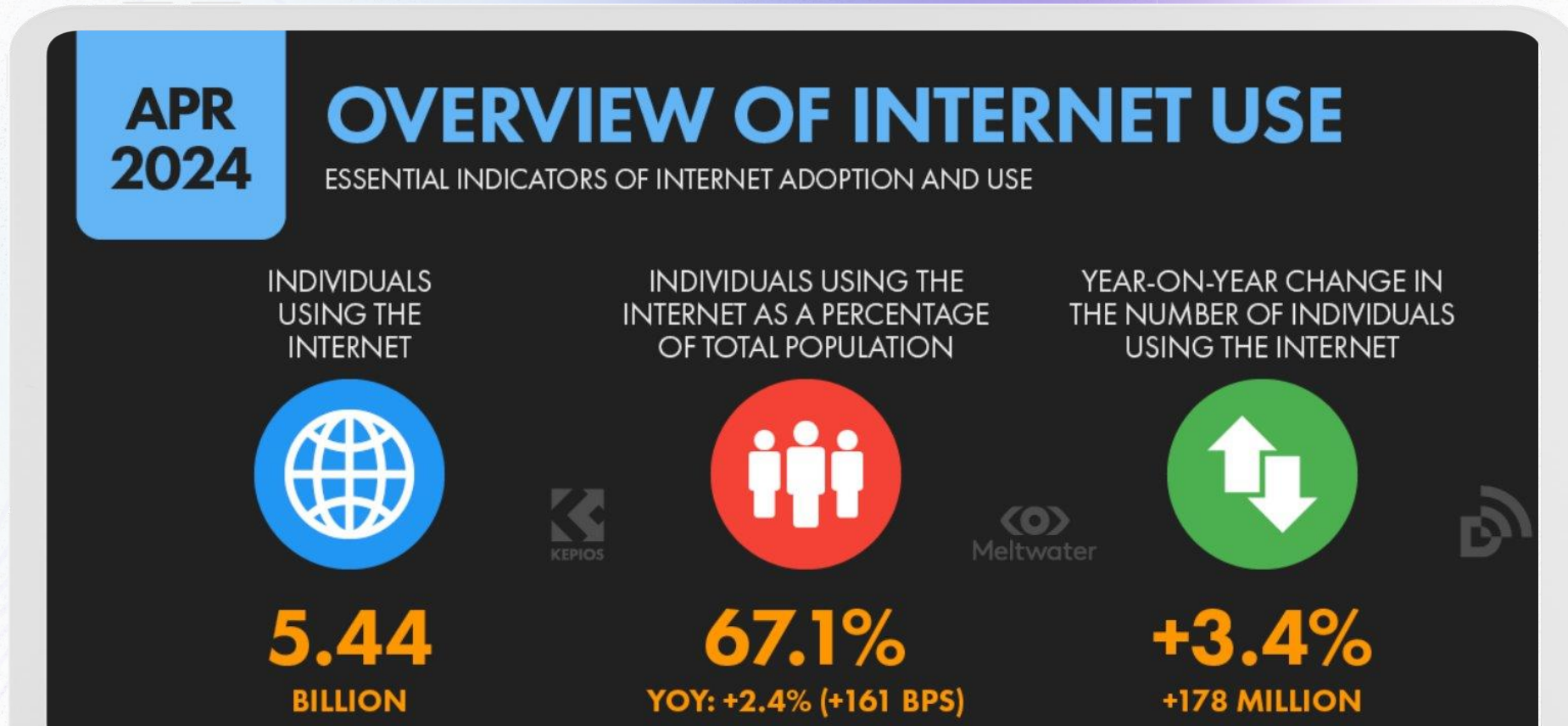
By [Matt Binder](#) on May 29, 2024



Give & Take

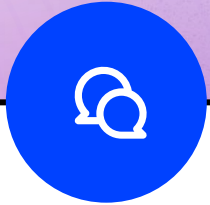


Cyber Criminals use this information to target us



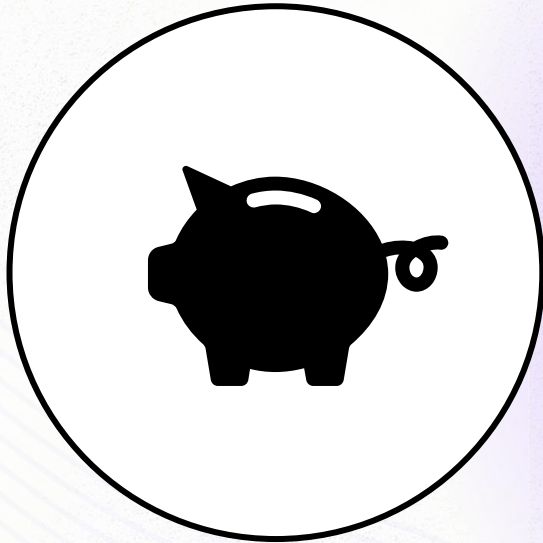
How Cyber Criminals use this information to target us

P A S S W O R D

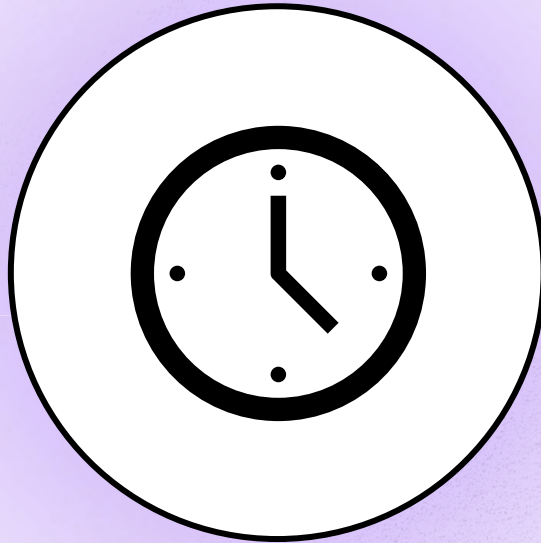


Prevention is better than cure

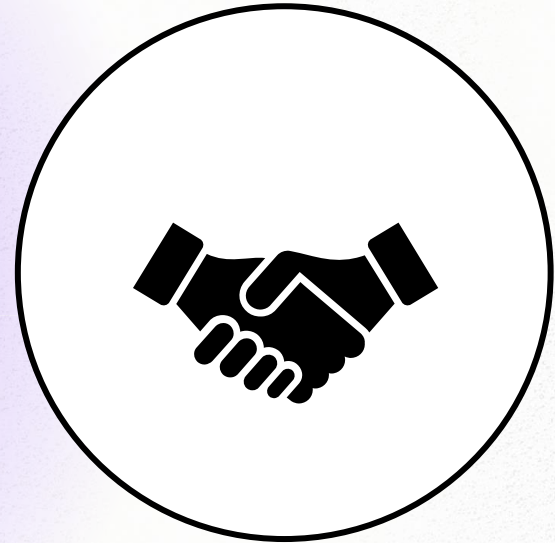
Desiderius Erasmus - Dutch philosopher



Cost Efficiency



Time Saving

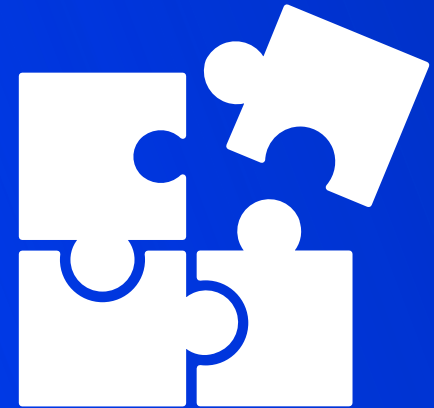


Reputation

Why Prevention is
better than cure

CRIME SCENE DO NOT CROSS

The Scene



The Investigation



Business Value of Prevention



Compliance

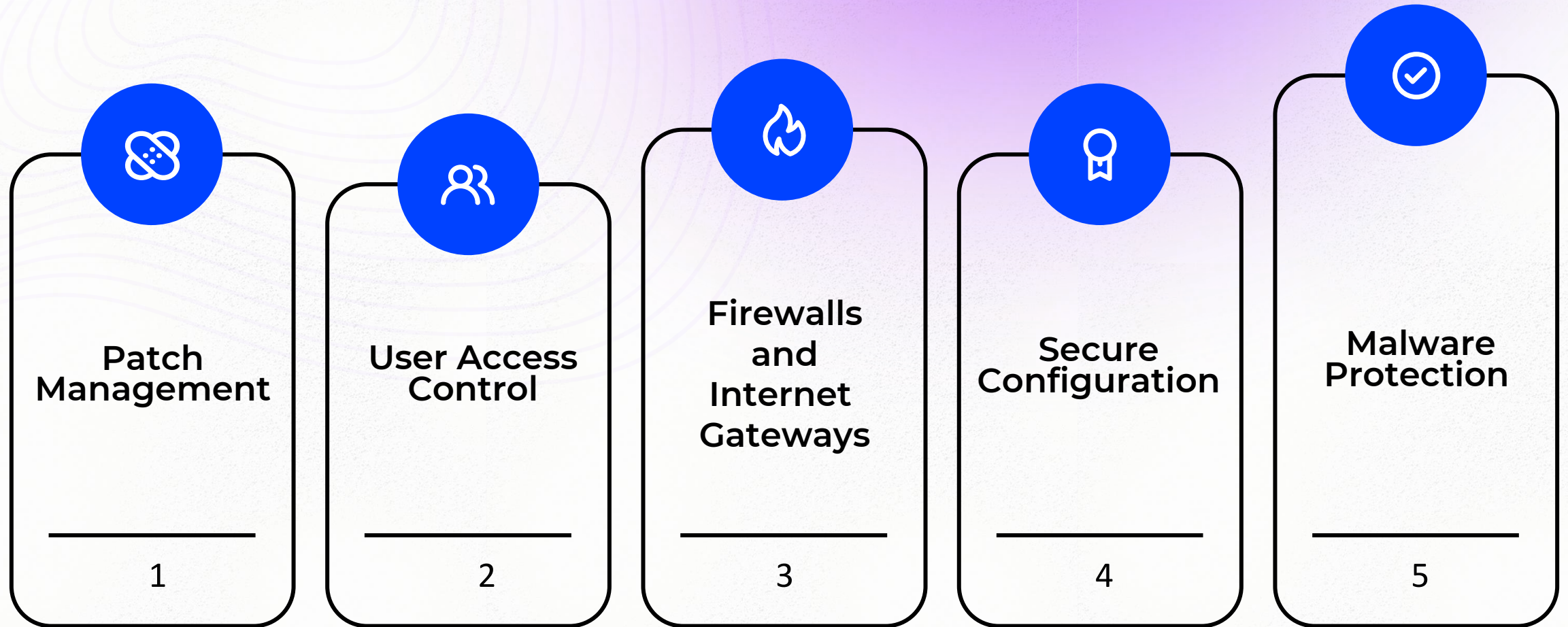


Insurance



Recovery

Technical Controls are Important

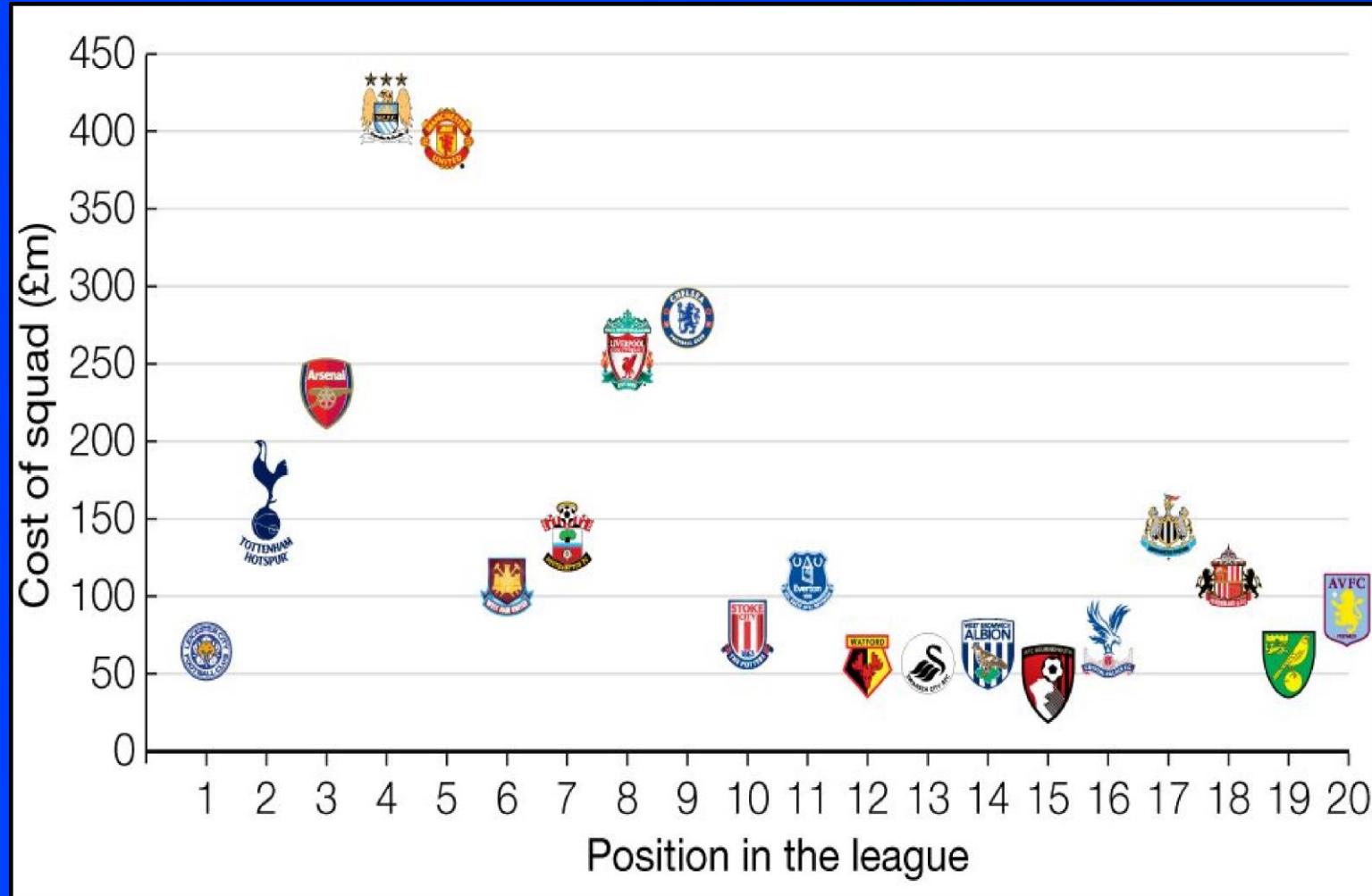


Culture Eats Technology for Breakfast

People must want
to use the tech
and the culture
must motivate
them to do so



Case Study – Leicester City FC



Culture Key Ingredients

1

Leadership
Example

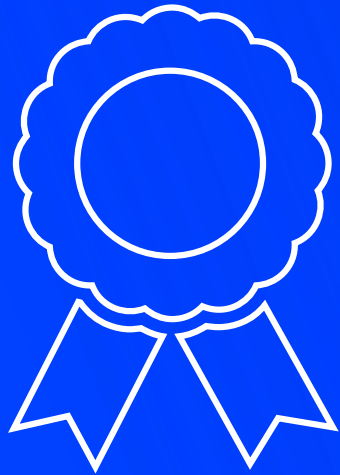
2

Employee
Involvement

3

Clear
Communication

Legal Loophole: The Consequence of Ignoring Cybersecurity



Legal Loophole: The Consequence of Ignoring Cybersecurity



Culture – The Pitfalls

- Training
 - Welfare
 - Discipline
-



Promote a strong Cyber Security Culture



Training & Education



Feedback Mechanisms



Continuous Improvement



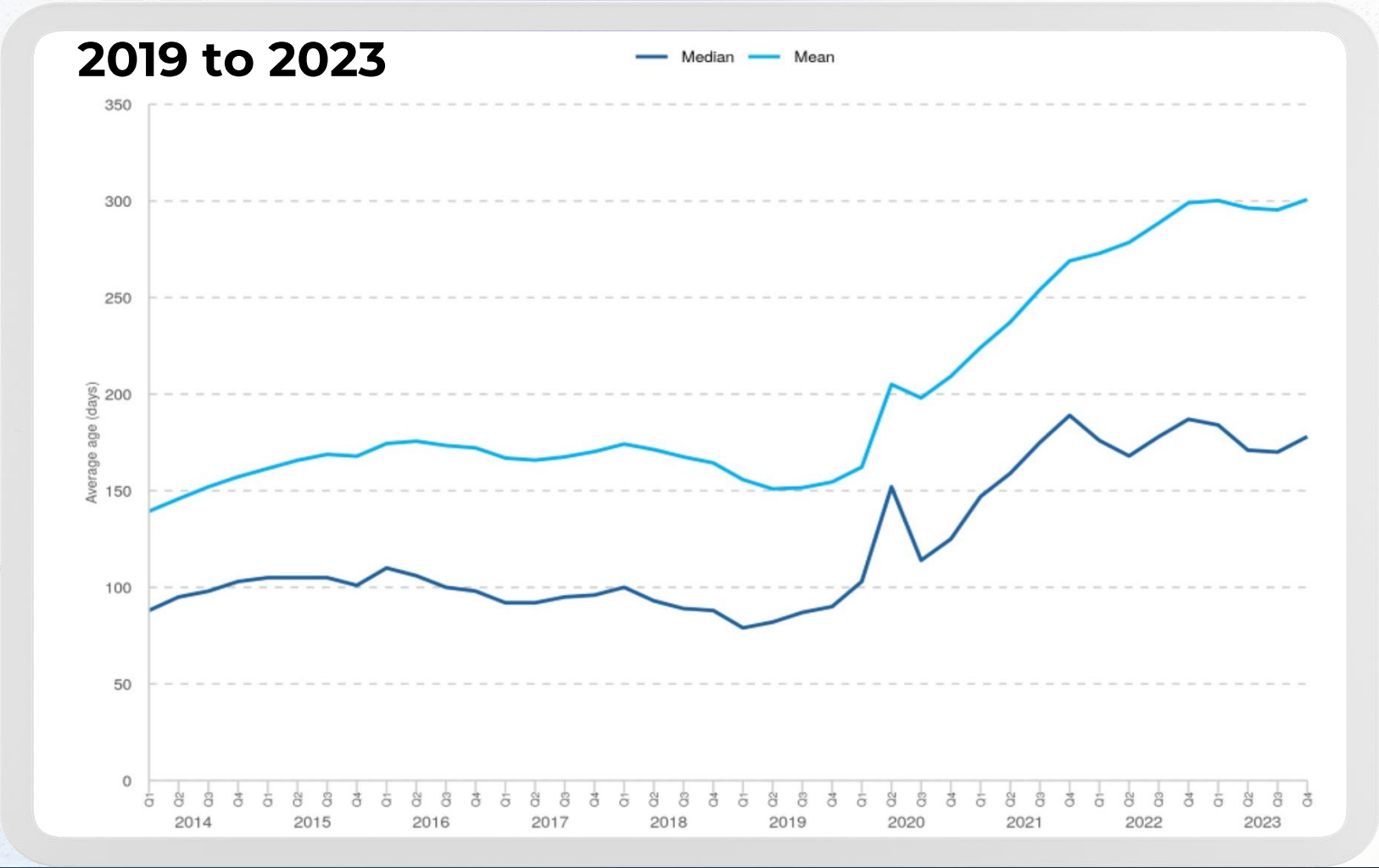
Celebrate Success



Recap

Criminal Investigations

How long does a serious or complex investigation take to conclude?

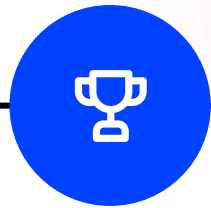


Prevention is
better than
cure, but you
must have a
cure!

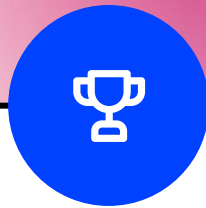


Restore →

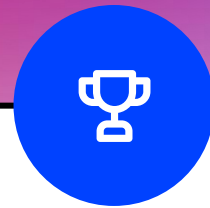
Strategy



Define Clear
Objectives



Regular Review
& Update



Engage
Leadership

Key Takeaways



Prevention is Crucial



Culture & Awareness Matter



Comprehensive
Strategy is
Essential

CompTIA Cybersecurity Resources





Thank you

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Networking Break

Be back at 11.30am

11:30 – 12:00	The Human Element
12:00 – 12:45	Open Community Forum
12:45 – 13:00	Sneak Peek at the CompTIA Community's New Mentoring Program
13:00 – 14:00	LUNCH
14:00 – 14:05	CompTIA Certification
14:05 – 14:30	Global Overview & Q&A with MJ Shoer

AGENDA

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James Doherty
Indigo Mentoring

The Human Element: The importance of industry communities



James Doherty,
Indigo Founder

What is a community?

“a social unit with a shared socially significant characteristic”



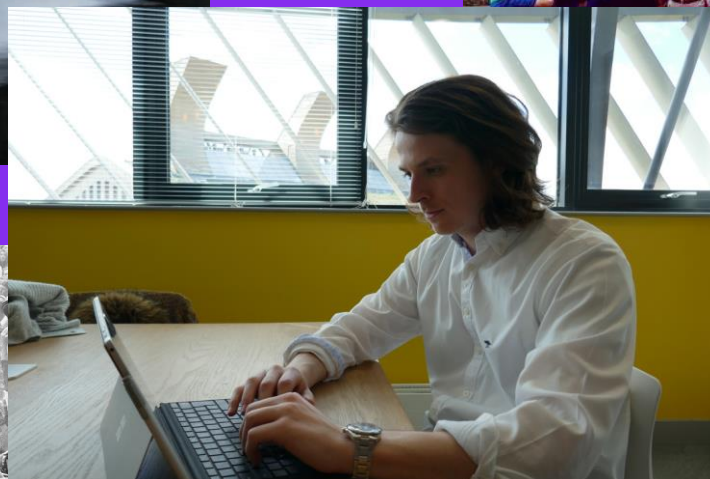


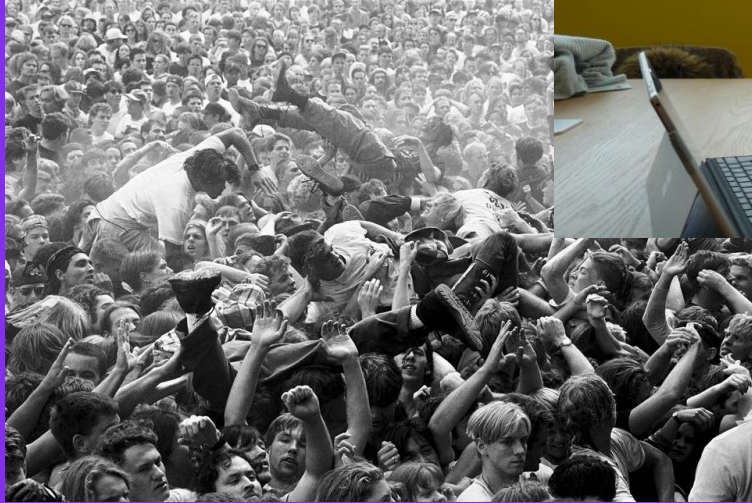


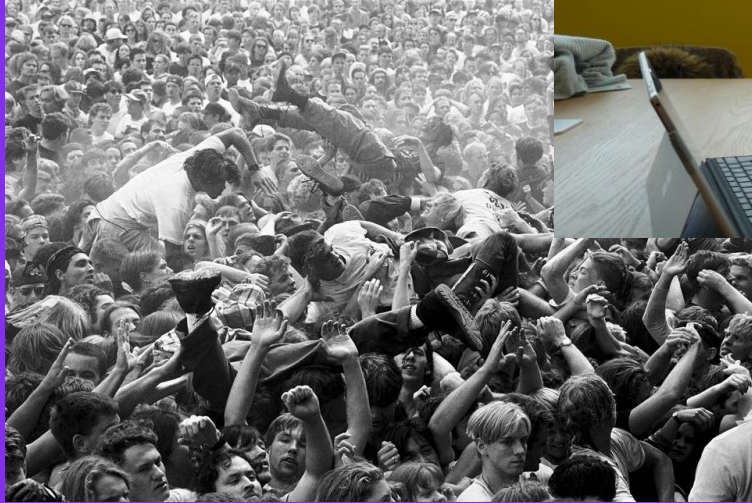














“What (or who) do you turn to when you’re not sure where to turn?”

Why is community important?



Injalak Hill Rock Art, Gunbalanya, Australia



Cave of Hands, Argentina



Injalak Hill Rock Art, Gunbalanya, Australia



Cave of Hands, Argentina





Injalak Hill Rock Art, Gunbalanya, Australia



Cave of Hands, Argentina





Injalak Hill Rock Art, Gunbalanya, Australia



Cave of Hands, Argentina



Lack of community

Social isolation and loneliness have been linked to increased risk for:

- Heart disease and stroke.
- Type 2 diabetes.
- Depression and anxiety.
- Addiction.
- Suicidality and self-harm.
- Dementia.
- Earlier death.

*House JS, Landis KR, Umberson D. Social relationships and health. Science. 1988;241(4865):540-545.

**Pantell M, Rehkopf D, Jutte D, Syme SL, Balmes J, Adler N. Social isolation: a predictor of mortality comparable to traditional clinical risk factors. Am J Public Health. 2013;103(11):2056-62.



Benefits

A study in the Journal of Health and Social Behavior found individuals with a strong support network experience **reduced levels of stress and anxiety**. Communities build resilience and improve mental well-being, leading to personal growth and a more positive outlook on life.

A study in the Journal of Child and Family Studies highlights that adolescents who **participate in community activities** have **higher self-esteem** and develop a more positive self-image.

A study from the Journal of Personality and Social Psychology found that **individuals who share their goals with others** are **more likely to achieve them**. By being part of a community, individuals have a support system that motivates and encourages progress.



Real world examples



Emotional Support

Support groups like (Alcoholics Anonymous, Group therapies etc.)

These work because they provide support, safety in numbers and encouragement through role modelling.



Building Confidence

Physical endurance

Race pace is usually always faster than your training pace due to the encouragement and herd mentality that takes over.



Accountability

Running Clubs

People hate to let other people down. “Where were you last week?” is a very powerful motivator as we don’t want to be seen as **unreliable** or **untrustworthy**.

Which would make you run faster?



Which would make you run faster?



Which would make you run faster?



Zombies, Run!

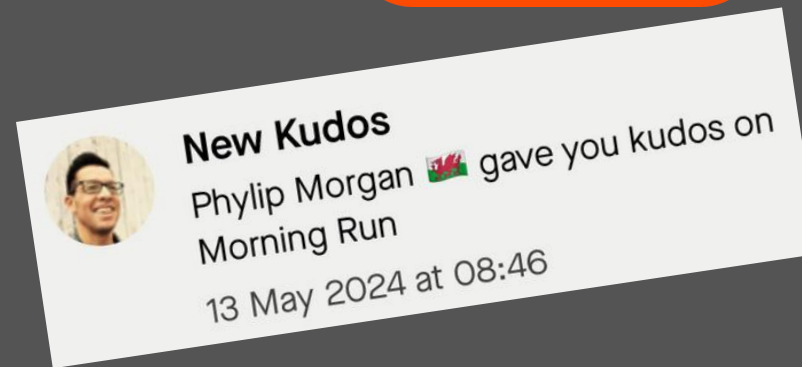


Strava

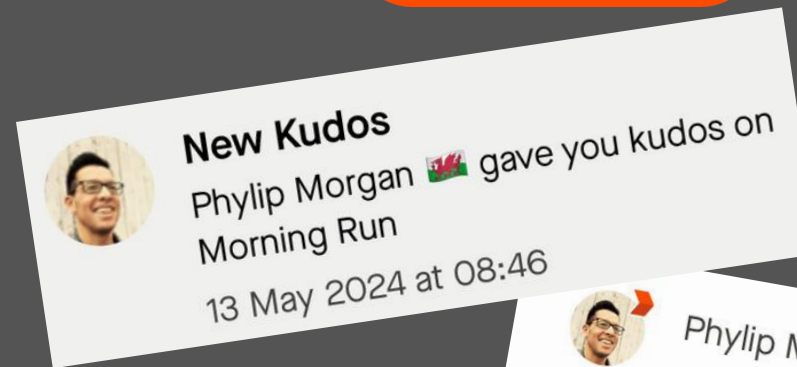
Which would make you run faster?



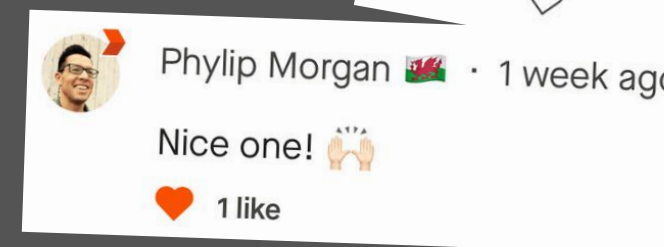
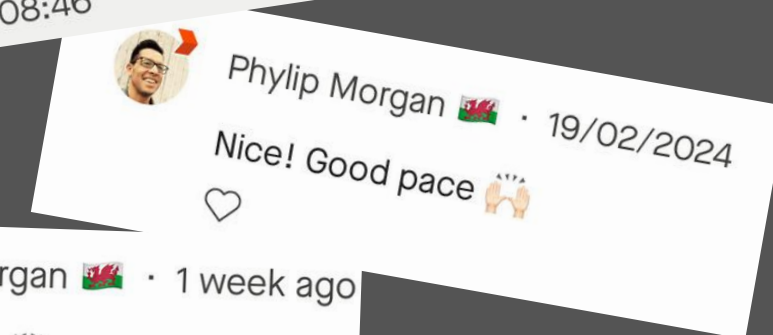
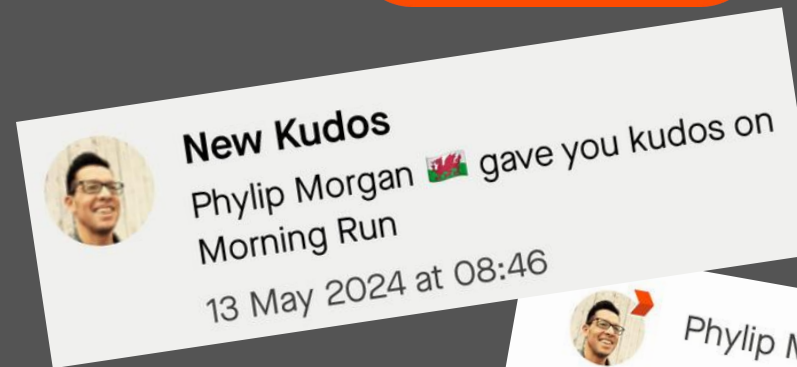
Which would make you run faster?



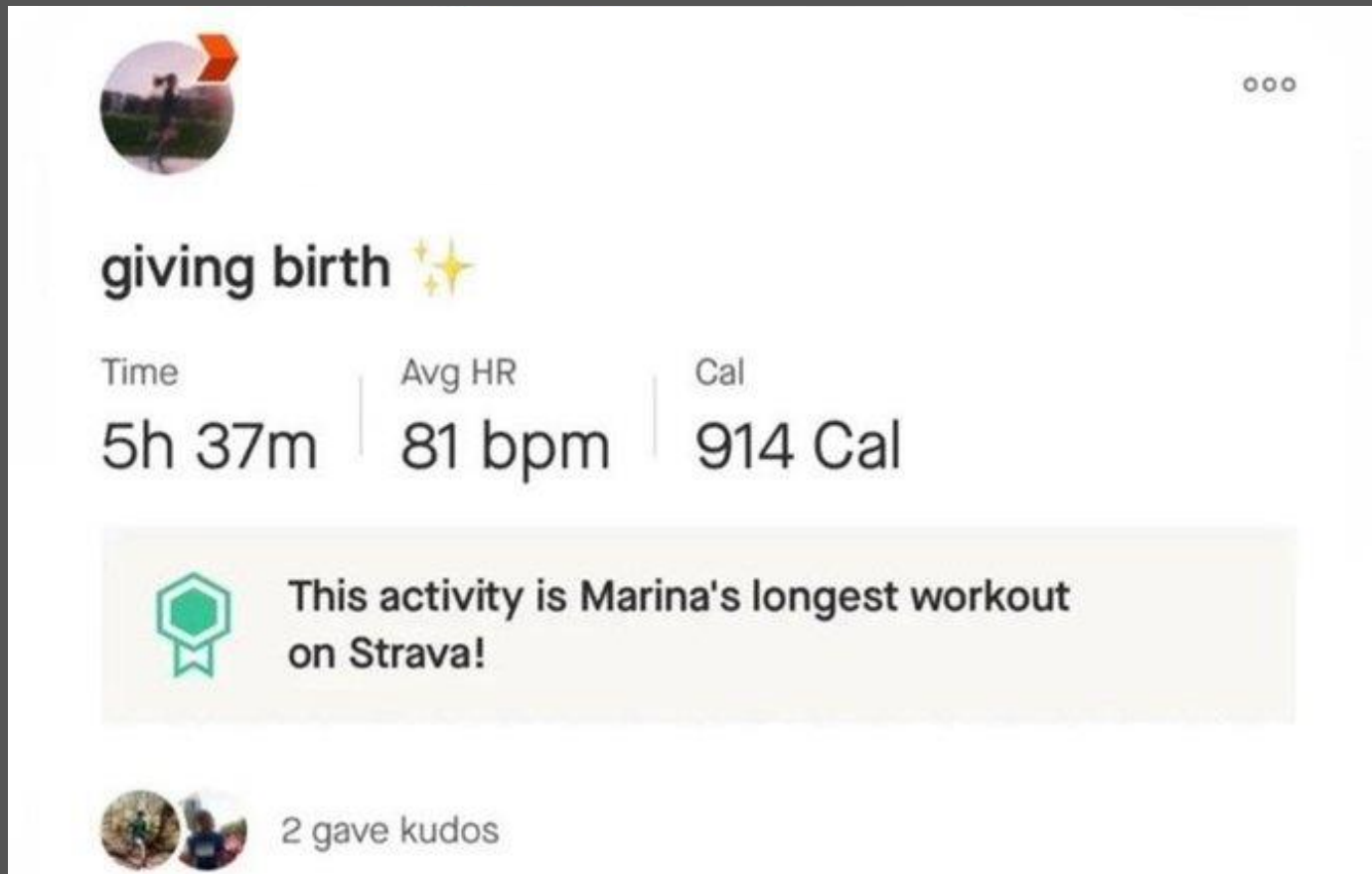
Which would make you run faster?



Which would make you run faster?



Beware of going too far..



Community in the work place

How to use community for your company



Employee Networks

Supported employees experience:

- 74% less stress
- 105% more energy at work
- 50% higher productivity
- 75% more engagement
- 40% less burnout

*The Neuroscience of Trust - Paul Zak,
Harvard Business Review, 2017

- Chambers of commerce.
- Trade / regulatory organisations.
- Specific interest groups.



Wider Business Networks

How to build community

(the low tech/no tech way)

Establish visible commonalities

Make sure that the things people have in common are immediately visible to create real connections.

Commonalities can be:

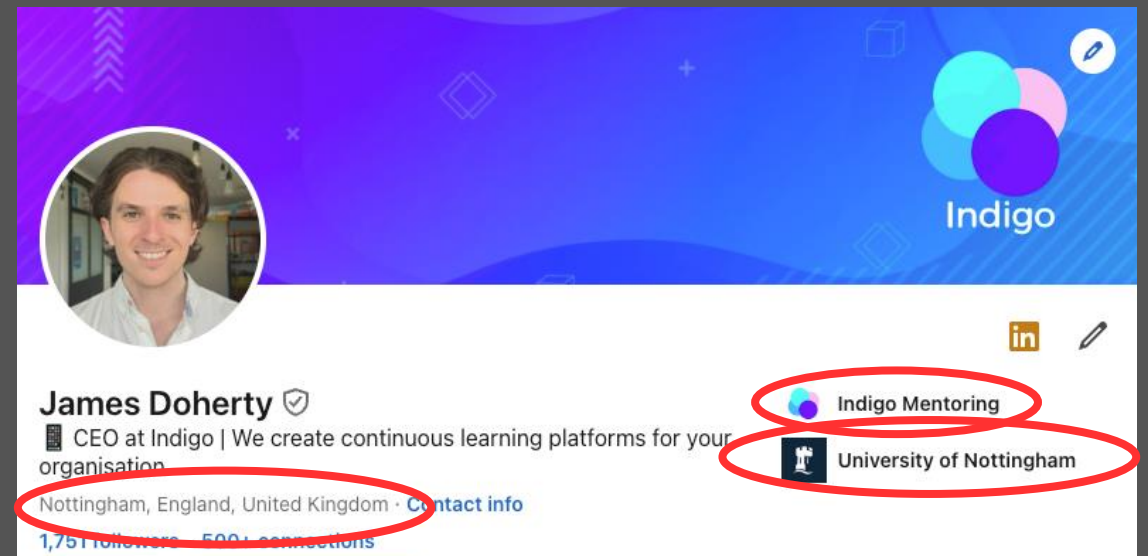
- Role
- Industry
- External Interests
- Location

Low Tech Idea:

Company profiles, email footers, badges/lanyards

No Tech Idea:

Make your networking intro more interesting.



Check in regularly

Create a place where people regularly check in on their progress and the community will inherently hold them accountable, for example where you're sat right now is a form of checking in with the community.

Low Tech Idea:

Schedule regular agenda-less meeting with your team.

No Tech Idea:

Change how you talk to your team.



Provide multiple touch-points.

Different people connect in different ways, having both one-to-one and one-to-many is essential for community building.

Make these support channels **clear and obvious**.

Encourage action by direct communication.

Low Tech Idea:

WhatsApp/Slack Channels (up to a point)

No Tech Idea:

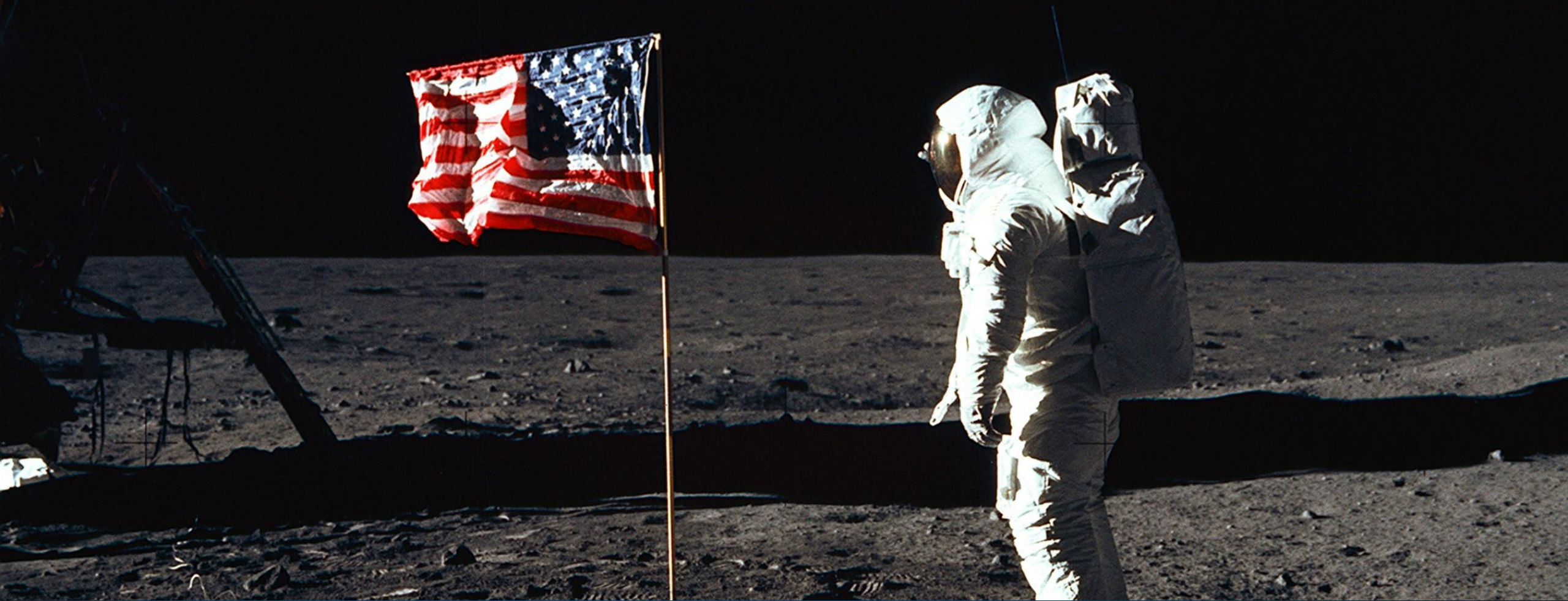
Talk twice. Once in public, once in private.



One last story



“I’m helping put a man on the moon.”



Thank you!



Email: james@indigomentoring.com

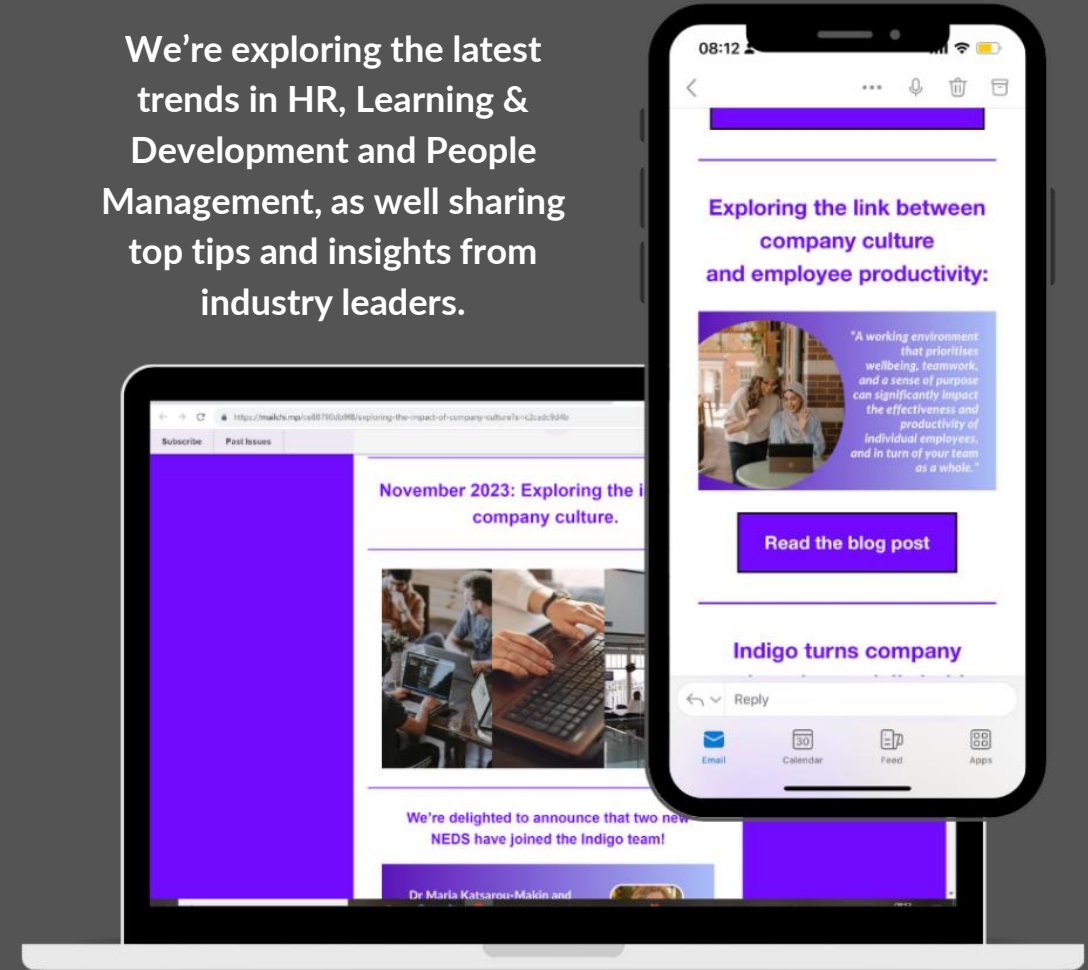
Website: IndigoMentoring.com



SCAN ME

Join People Management Monthly

We're exploring the latest trends in HR, Learning & Development and People Management, as well sharing top tips and insights from industry leaders.



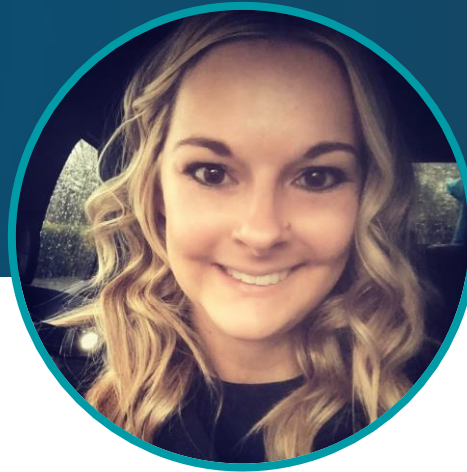
11:30 – 12:00	The Human Element
12:00 – 12:45	Open Community Forum
12:45 – 13:00	Sneak Peek at the CompTIA Community's New Mentoring Program
13:00 – 14:00	LUNCH
14:00 – 14:05	CompTIA Certification
14:05 – 14:30	Global Overview & Q&A with MJ Shoer

AGENDA

WE ARE THE CompTIA® COMMUNITY



Paul Croker
18it



Lizzie Robinson
Pax8





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Andrew Allen

Aabyss

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UK & Ireland

Mentorship Program Overview



The CompTIA mentoring program connects company members looking to develop relationships within the industry that will help them grow in their careers, improve their knowledge and skill set, and provide networking opportunities and meaningful engagement within the CompTIA community.

This program will focus on sharing knowledge and the secrets to success, as well as guiding and supporting the mentee in achieving relevant goals and reaching their full potential personally and professionally.

Measurable goals are to be set by the mentor and mentee.

- The program will officially run from July to October 2024.
- **Save the Date** – EMEACon, October 20-21, we will host a graduation reception for this cohort.
- Do not sell. We're here to make meaningful connections.
- Be respectful of each other's time.
- Forums are open. One for mentees and one more for mentors to chat, share ideas, etc.
- Feedback is WELCOME! Help us develop this program.
- Have fun!







Mentors

- Meet with your mentee regularly. Cadence is determined by you and your mentee.
- Stay accessible, committed, and engaged during the program.
- Keep your conversations confidential.
- Be a positive role model.
- Offer encouragement through genuine positive reinforcement.
- Share “lessons learned” from your own experiences.
- Be a resource and a sounding board.
- Provide open and candid feedback.
- Willingly share your experience and professional success.
- Share CompTIA resources.

Mentees

- Meet with your mentee regularly. Cadence is determined by you and your mentor.
- Stay accessible, committed, and engaged during the length of the program.
- Keep your conversations confidential.
- Actively listen and ask questions.
- Commit to self-development.
- Be open and honest on goals, expectations, challenges, and concerns.
- Prepare for meetings and come with an agenda.
- Comfortably give feedback to the mentor on what is working or not working in the mentoring relationship.
- Seek advice, opinion, feedback, and direction from the mentor.
- Assume responsibility for acquiring or improving skills and knowledge.
- Let the mentoring program manager know as soon as possible if you are having a problem connecting with your mentor.

Program Framework

Week 1-2: Orientation and Goal Setting

Introduction and Rapport Building: Share personal and professional backgrounds to establish a connection.

Understand the Mentee's Aspirations: Discuss the mentee's career goals, strengths, weaknesses, and areas of interest.

Set Clear Objectives: Together, define specific, measurable, achievable, relevant, and time-bound (SMART) goals for the mentorship period.

Week 3-4: Skill Assessment and Learning Plan

Skill Gap Analysis: Identify the skills and knowledge the mentee needs to develop to achieve their goals.

Leverage Learning Plan: Utilize the IDP and Goals form.

Establish Checkpoints: Set milestones and regular check-in points to monitor progress.

Week 5-8: Development and Exploration

Focused Learning: Encourage the mentee to engage with the learning resources and apply new knowledge in practical scenarios.

Shadowing and Networking: If possible, arrange for the mentee to shadow you or other professionals. Introduce them to your network.

Feedback Sessions: Provide constructive feedback on their progress and adjust the learning plan as necessary.

Week 9-12: Application and Reflection

Project Assignment: Assign a task allowing the mentee to apply their new skills in a real-world setting.

Career Planning: Start conversations about career paths, potential next steps, and strategies for achieving long-term goals.

Week 13-14: Professional Development

Soft Skills Development: Focus on developing soft skills such as communication, leadership, and time management.

Resume and LinkedIn Review: Offer to review and provide feedback on their resume and LinkedIn profile, suggesting improvements to effectively showcase their skills and experiences.

Week 15-16: Program Wrap-up and Future Planning

Review Goals and Progress: Evaluate the mentee's progress towards the initial goals set at the beginning of the program.

Celebrate Achievements: Acknowledge the mentee's hard work and achievements throughout the mentorship.

Future Planning: Discuss next steps, potential opportunities, and how the mentee can continue their professional development beyond the mentorship program.



- Member benefits
 - Industry insights and business tools
 - Marketing toolkit, Legal toolkit, Video playbook, MSP Guidebook: Cultivating a Culture of Process Efficiency.
- CompTIA events
 - EMEACon, Regional Meetups, CCF, ChannelCon
- CompTIA learning portal & Member Ed
 - Operations & Finance
 - Sales & Marketing
 - Technology
 - Channel Ecosystem
- Member directory
- Cyber Programs
 - ISAO, Trustmark, Response Team
- Certification discounts
- Industry research
 - IT Industry Outlook
 - Cybersecurity Trends
 - State of the Channel
- Member journey – *NEW*

1. Submit your interest.
2. When matched, meet your mentor/mentee.
3. Schedule recurring meetings. It is up to you to determine the frequency.
4. CompTIA will host monthly check-ins with mentors and mentees.
5. Feedback, Feedback, Feedback.



Mentor to Mentee

1. What are some specific skills or knowledge areas you want to develop?
2. What are your strengths and areas you need/want to improve?
3. What are some of the biggest lessons you've learned in your career so far?
4. What are some professional resources or networks you currently utilise?
5. What are some accomplishments you are proud of?

Mentee to Mentor

1. What were some of the biggest challenges you faced in your career, and how did you overcome them?
2. Can you share some strategies or habits you've found particularly beneficial for your professional growth?
3. What are some common mistakes you see people in my position make, and how can they be avoided?
4. How did you build and maintain your professional network?
5. How do you handle stress and high-pressure situations at work?

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QUESTIONS?



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Thank you!



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LUNCH

Be back at 2pm

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Jason Moss
Certifications

OUR NEW PARTNER LEVEL DISCOUNTS



- **Bigger Discount in line with Partner Discounts**
- **20% off Vouchers & varying % off of content**
- **Bundles Available**

Content Offerings

Essentials	Career +	Professional +	Expert
Skills Appropriate for Tech and Non-Tech Professionals	Skills Appropriate for Tech and Non-Tech Professionals Interest in Tech Exploration	Skills Appropriate for New or Upskilling, and Career Tech Professionals	Skills Appropriate for Expert Tech Professionals
Soft Skills Essentials Business Essentials AI Essentials Office Pro	Tech+ a+ network a+ cyber a+ coding Project+	A+ Network+ Cloud+ Security+ Data+ Project+ Linux+ Server+ Windows Client Hybrid Server Pro PenTest+	Cloud+ CYSA+ PenTest+ DataSys+ DataX SecurityX CloudNetX

*Red Courses coming 2024

CertMaster Learn for Instructor-led Training Bundle Options

2024 CompTIA incentive bundles for Authorized Partners to deliver more value for best in class learning.

Bundle Options		Pricing	RRP
The logo shows the CompTIA logo above a red box with 'Security+' and a circular icon below it.	Learn + CertMaster Labs + Voucher	£259	£938
	Learn + CertMaster Labs + Practice + Voucher	£279	£1,064

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MJ Shoer

CompTIA

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Ian Groves

Start Tech

The CompTIA MSP Guidebook

Cultivating a Culture of Process Efficiency

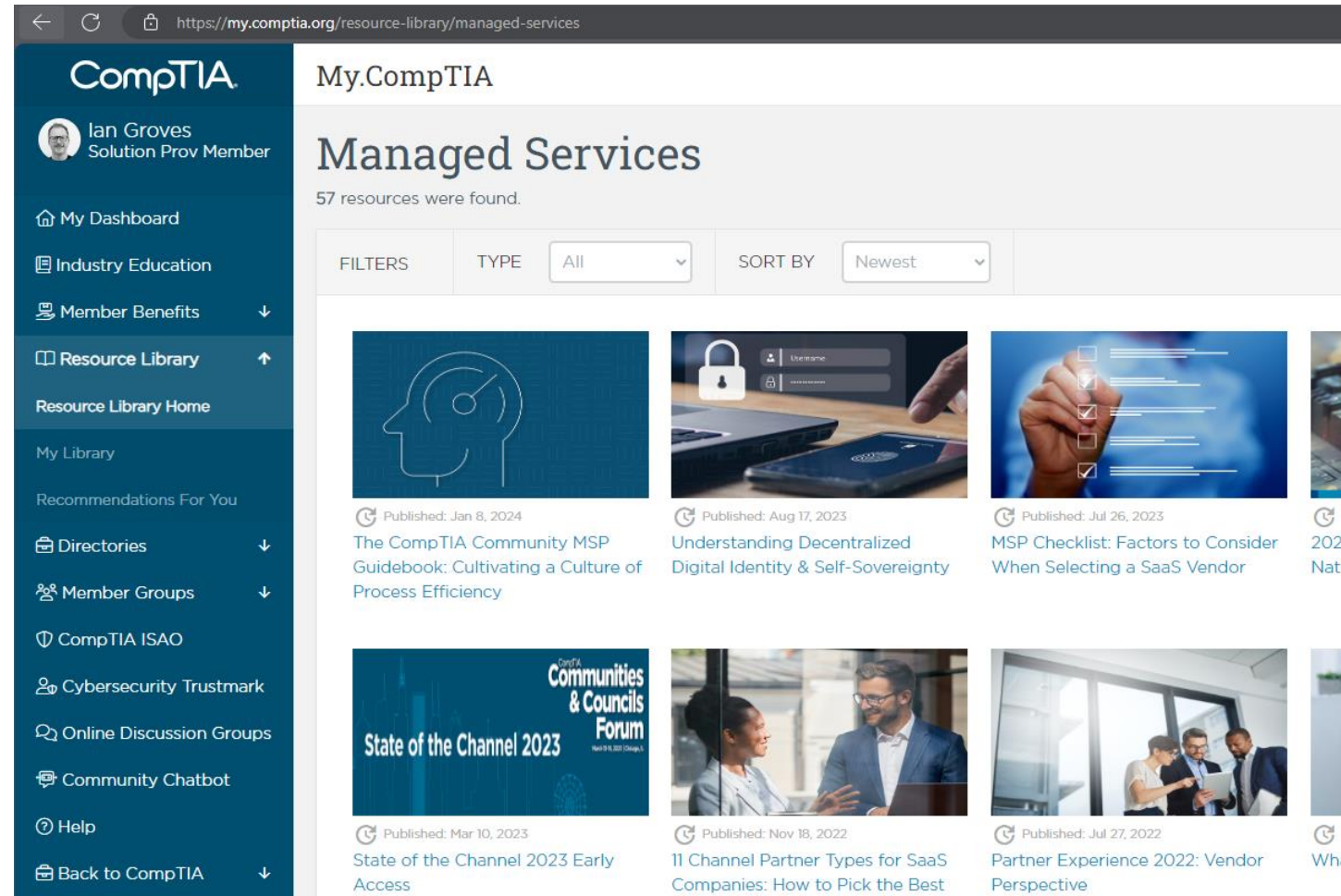
Ian Groves

Managing Director

Start Tech

The CompTIA Resource Library

- Free to access for members
- Over 698 resources
- 34 Whitepapers
- 57 resources specifically for MSPs
- Fantastic marketing material

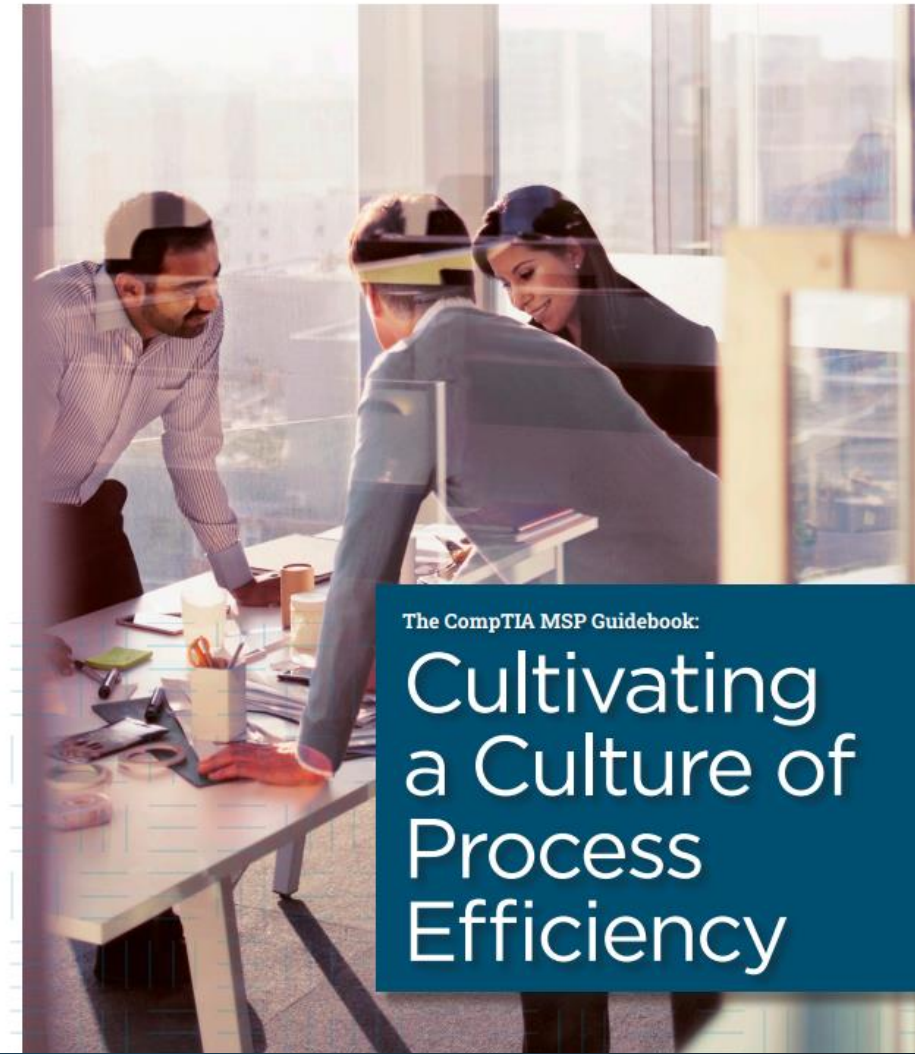


What are we looking at?

The CompTIA MSP Guidebook serves as a framework for managed service providers (MSPs) to create a culture of process efficiency, by first identifying areas of improvement, then implementing best practices and strategically building awareness.

CompTIA

WHITE PAPER



What in this MSP Guidebook?

- Assess Your Service Portfolio
 - It's All About Your Ideal Customer
 - Where Do I Win?
 - Uncover Your Superpowers
- Build Effective Business Processes
 - Build a Better Process: Quarterly Business Reviews
 - Build a Better Process: Customer Success Roadmap
- Invest in People
 - Best Practices: Before You Hire
 - Best Practices: The Hiring Process
 - Best Practices: Onboarding New Hires
- Manage Your Vendor Partners
 - Making Informed Partnership Decisions
 - Negotiating With Vendors
 - Implementing a Vendor Management Policy

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It's All About Your Ideal Customer

Understanding your ideal customer profile (ICP) is a cornerstone for success in the competitive landscape of MSPs. By delving deep into the needs and preferences of your target audience, you gain the power to tailor your services, marketing efforts and operations to align perfectly with your ideal clients.

Understanding your ICP enables you to attract the right clients, customize your offerings, differentiate yourself from competitors and deliver exceptional customer experiences, ultimately leading to business growth and success

- In the beginning, it is beneficial to be opportunistic
- As you grow, you should narrow your focus to the customers where you win the most

It's All About Your Ideal Customer

Factors to consider:

Industry focus, business size, geographical location, **IT budget**, pain points, scalability, compliance, digital transformation readiness, value of downtime

Understanding where you win

Customer Name	IT Budget	Annual Revenue	Industry	Employee Size	Region	Pain Points

It's All About Your Ideal Customer

Remember to regularly review and refine your ideal client profile based on the success of your sales efforts, market trends and customer feedback. Continuously adapt your approach to target the most promising opportunities.

Quarterly Business Reviews

Quarterly business reviews (QBR) serve as crucial checkpoints where both parties come together to evaluate the progress, performance and overall health of their partnership.

These meetings provide an opportunity to assess the effectiveness of strategies, address challenges and align objectives for future growth.

Quarterly Business Reviews

5 Reasons MSPs Should Engage in QBRs

1

Relationship Building:

QBRs provide an opportunity for MSPs to strengthen their relationship with their clients.

By engaging in face-to-face or virtual meetings, MSPs can foster open communication, understand the client's goals, and align their services accordingly.

Regular QBRs help build trust and rapport, allowing MSPs to become trusted advisors rather than just service providers.

Quarterly Business Reviews

5 Reasons MSPs Should Engage in QBRs

2

Performance Evaluation:

QBRs allow MSPs to evaluate their own performance and demonstrate the value they bring to the client's business.

By reviewing the performance metrics and discussing the outcomes achieved, MSPs can showcase their expertise, highlight areas of improvement, and discuss future plans.

This evaluation helps clients understand the value they receive from the MSP and justifies the investment in their services.

Quarterly Business Reviews

5 Reasons MSPs Should Engage in QBRs

3

Strategic Alignment:

QBRs enable MSPs to align their services with the client's business objectives.

By understanding the client's long-term goals and plans, MSPs can make strategic recommendations and propose solutions that address specific challenges or opportunities.

QBRs facilitate discussions about technology road-maps, upcoming projects, and potential enhancements, ensuring that the MSP's services remain aligned with the client's evolving needs.

Quarterly Business Reviews

5 Reasons MSPs Should Engage in QBRs

4

Proactive Issue Resolution:

QBRs provide a platform for identifying and resolving any ongoing or potential issues.

By discussing any challenges or concerns faced by the client, MSPs can take proactive measures to address them before they become significant problems.

QBRs allow for open dialogue, problem-solving, and collaborative decision-making, helping both parties stay ahead of potential disruptions and ensure a smooth operation

Quarterly Business Reviews

5 Reasons MSPs Should Engage in QBRs

5

Client Satisfaction and Retention:

Regular QBRs demonstrate that the MSP is committed to the success of the client's business.

By actively engaging in strategic discussions and evaluating performance, MSPs show that they are invested in the client's outcomes.

This level of attentiveness enhances client satisfaction and improves the likelihood of long-term retention.

QBRs also provide an opportunity for clients to voice any concerns or provide feedback, enabling MSPs to take appropriate action and enhance their services.

Best Practices: Before You Hire

Always be recruiting

The more you connect to others outside of your regular circle, the more you will be comfortable with networking and delivering your company's value and why you are different from the rest.

What Do You Need in a Candidate?

Consider what is needed now and take a bit of time to determine what will be needed in the future.

- Do you need the candidate to fulfil a role and remain in that role for your business?
- Do you think the candidate you hire today can grow with your strategy?
- Do you have time to nurture a candidate for a potential future need role?
- Do you have a pipeline opportunity where you will immediately require staff?

Best Practices: Before You Hire

Interviewing 101

For all roles, consider these team-oriented questions:

- Can you describe a time when you disagreed with a team member and how you handled it?
- How do you ensure effective communication within a team, especially during high-pressure situations?
- What strategies do you use to manage stress and maintain productivity in a fast-paced IT environment?
- How have you contributed to fostering a positive team culture in your previous roles?
- Can you provide an example of when you mentored or helped a less experienced team member with a technical problem?

Best Practices: Before You Hire

Interviewing 101

Testing the Candidate for Technical Knowledge

There are a variety of resources, both free and paid, that can be used to test candidates for knowledge in technical aspects of help desk support for both PC and Apple support. Here are a few suggestions:

- TestDome (<https://www.testdome.com/>): Offers a range of technical tests, including IT and system administration. It allows you to test candidates on real-life problems.
- Indeed Assessments (<https://www.indeed.com/assessments>): Offers a wide variety of skill tests, including those related to IT support, that can be sent directly to candidates.
- eSkill (<https://www.eskill.com/>): Provides a variety of pre-employment tests, including IT skills testing. eSkill's tests can be customized to the job and the skills required.

Making Informed Partnership Decisions

Vendor management is not merely about engaging with third-party suppliers; it is a strategic discipline that directly impacts an MSP's ability to deliver quality services, enhance operational efficiency and build trust with clients.

The importance of effective vendor management cannot be overstated, as it serves as the foundation for a resilient and reliable IT infrastructure.

The process of identifying reliable vendors amidst a sea of options can be daunting and overwhelming.

Making Informed Partnership Decisions

Some Data Points to Consider

1. Company background and culture
 - a. Years in business
 - b. Employees
 - c. Annual revenue
 - d. Financial backing
 - e. Reputation and references
 - f. Relevant certifications
 - g. Outstanding legal entanglements
 - h. Corporate culture
2. Product and/or service
 - a. Type of product/service
 - b. Other product lines
 - c. Primary focus
 - d. Product-specific requirements
3. Service-level agreements
 - a. Uptime guarantee
 - b. Response and resolution times
 - c. Remedy for SLA breach
4. Security and compliance
 - a. Relevant compliance requirements
 - b. Certified requirements
 - c. Data protection practices
 - d. Access to end user data
 - e. Encryption methods
 - f. Data resident
 - g. Disaster recovery plan
 - h. HIPAA BPA
 - i. Sufficient insurance coverage
5. Support and maintenance
 - a. First and second level of support
 - b. Support team
 - c. Maintenance policy
 - d. Outage notification
6. Scalability and future readiness
 - a. Scale to future needs
 - b. Published roadmap
 - c. Partner advisory council to drive product development
7. Pricing and contract terms
 - a. Pricing
 - b. Hidden or add-on costs
 - c. Discount levels or requirements
 - d. Agreement length/term
 - e. Payment terms

Takeaway....

Download the Guidebook....



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Carl Jones

Carl Jones PR

Have You Got News For Them?

Carl Jones



Raising your profile
in the media...
and entering awards

Who Am I?

- **Worked in the media since 1988**
- **Edited magazines and newspapers**
- **Produced and presented radio and TV shows**
- **Media trained business leaders**
- **Ghostwritten and provided PR strategy advice**
- **Produced award entries for many clients**
- **National and regional award-winner**

Hands Up If You Agree With This

- **“What people say about me and my organisation matters...”**

About This Session

1. ***What Is News*** – *how to find out if you have a real story to tell?*
2. ***Who To Target*** – *understanding how the media works*
3. ***Grabbing Attention*** – *the art of telling a good media story*
4. ***Does PR Really Work?***
5. ***Identifying PR opportunities***
6. ***FAQs***
7. ***Entering Awards*** – *the art of a winning entry*

What is News...?

- **Something that gets people talking**
- **Controversial / Confrontational**
- **Informative / Investigative**
- **Topical / Surprising / Original**
- **About people**

How a Journalist Thinks

- I want to please my editor
- I want to be first with the story
- I don't want my work to be re-written, and want it on the front page, or top of the bulletin
- I want to make my life as easy as possible!!! 😊

Who Does What?

- **The Editor - overall hands-off role**
- **News Editors - hands-on behind scenes**
- **Reporters - public facing writers**
- **Specialist writers**
- **TV/radio producers**
- **TV/radio presenters**
- **B2B or B2C media?**

TIP

Keep your media
contacts book up to
date.

Grabbing attention

- **What is your USP, in a sentence?**
- **Imagine telling a joke upside down, with punchline first**
- **The 'local pub test'**
- **Short, sharp, crisp sentences**
- **300 words is usually enough for starters!**

TIP

Study the media you want to target and try to mimic their writing style.

Stories are shorter than you think

- **Radio/TV news item - 70 words**
- **Radio/TV 'feature' – 3 mins (450 words)**
- **Newspaper lead story - 350 words**
- **Average media story - 90 words**
- **TV feature – movement, not words**

Grabbing attention

- **‘Readers only soak in, on average, the first 26 words of any story which they read, regardless of its length . .**

’

▪

Society

Source: The Newspaper

Grabbing attention

- **‘Positive media coverage is the most cost-effective form of advertising. Why? Because customers feel the news organisation is endorsing the business and/or its views’**

Source: Institute of Directors

Isn't The Printed Media Dead?

- **No . . . Latest research shows 39% of adults under 35 still read some form of news or magazine every day . . . rising to 62% of people over 45**

Source: Experian

Power of the Press – case studies

- ▶ **Ceramic figurines**
- ▶ **Millennium Dome roof**
- ▶ **Downing Street garden**
- ▶ **Daniel Craig's pub**

TIP

A small value contract to your business could be a big news story to others.

Writing a Story

- **The 'intro' is everything**
- **Identify six key points you want to communicate**
- **Turn bullet points into words - most important point first**
- **Most submitted stories will be cut from the bottom up**

TIP

Look at the kind of words writers use and ask yourself: “Why is it like that?”.

Writing a Story

- TIP OF THE DAY: THE W FORMATION
- Who?
- What?
- Where?
- When?
- Most importantly of all . . . Why?

Telling your Story

- Quoting people - always good
- Background information
- Notes and contact details
- Assume journalist knows nothing about your business
- Don't say anything you can't prove

TIP

Don't leave questions unanswered. Every gap reduces the chance of your piece being published.

Identifying PR Opportunities

- **New initiatives / appointments**
- **Investment in new equipment**
- **Anniversaries / milestones**
- **Best ever months / years**
- **Awards / accolades**
- **Manipulated news!**

TIP

It's easy to 'manipulate' some kind of PR opportunity by creating an event.

Identifying PR Opportunities

- **Are you already doing it without realising?**
- **Internal newsletters and comms – could deserve a wider audience**
- **Package up a story – words, video, blogs, pics**
- **Make yourself available as an ‘expert’**
- **Provide case studies**

TIP

Look at your website and ask yourself: “Should we be writing PR about anything here?”.

Printed word v Spoken word

- **Daily newspaper** - more topical and time sensitive, 36 hour shelf life
- **Weekly newspaper** - more local or community news. Loyal readers. Longer shelf life
- **Trade and B2B publication** – will have long-lead times and editorial schedules they can share

Know who's who on your industry media scene

- B2C – Birmingham Post & Mail, Express & Star, Coventry Telegraph, Shropshire Star, Worcester News
- BBC and commercial radio stations
- Regional TV broadcasters, Central News, Midlands Today etc
- Your trade publications. Do you know the editors and teams of correspondents?
- **IMPORTANT LESSON:** People often send the right story to the **wrong person** . . . or at the **wrong time** . . . or in the **wrong format**

A few FAQs

- **Commercial features - are they worth paying for?**
- **Do you have to advertise for your editorial to be favourably considered?**
- **Can you prevent a story about you or your organisation being published?**

A few FAQs

- **Should you ever say ‘no comment’ if a reporter contacts you?**
- **Can you ask for a copy of what is being written or broadcast about you, before publication?**
- **Will a radio or TV journalist give you a heads-up on questions they plan to ask?**

A few FAQs

- **Should you embargo a story?**
- **What are the plus and minus points of giving a story exclusively to one journalist or publication?**
- **Can you 'book' a media photographer or camera crew to attend an event?**
- **Should you chase up a journalist to find out if they are going to publish your story?**

And the awards go to...

- **Read the criteria CAREFULLY**
- **Don't assume knowledge – make sure to clearly explain what you do**
- **Write in plain English, avoiding jargon**
- **Use testimonials and third-party endorsements**
- **Provide evidence of anything you boast**

And the awards go to...

- **Study previous winners**
- **Don't post links – include the facts. Judges want DETAIL and SPECIFICS**
- **Ask yourself – ‘How Do I Stand Out From The Crowd’?**
- **Remember THE W FORMATION – apply it to the final read-through before you submit**
- **Stick to the word count – but maximise it**

Thanks for listening

Carl Jones

Media Consultant, Broadcaster, Master of Ceremonies

Office: 01785 823382

Mobile: 07836 521289



Institute of Journalists & Midlands Media Awards winner

BBC Shropshire - presenter and film reviewer

Shropshire Business - editor and director

SBLTV - producer and presenter

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Networking Break

Be back at 3.45pm

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Teresa Heath-Wareing

Teresa Heath-Wareing Limited

The background features several thick, red, hand-drawn style scribbles that overlap the text.

SABOTAGE

THERESA HEATH-WEIRING

Meet Katie

Business owner helping
parents teach their children
self esteem



Meet Katie

Business owner helping
parents teach their children
self esteem

Wanted to start a podcast



not real name

Meet Katie

not real photo

Business owner helping
parents teach their children
self esteem

Wanted to start a podcast



- Research

- Research
- Decided she needed a better space to record

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- Lighting wasn't good enough - bought some lights

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- Decided she needed a better space to record
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- Planned who she wanted to speak on the podcast

- Research
- Decided she needed a better space to record
- Lighting wasn't good enough - bought some lights
- Started looking at mics
- Planned who she wanted to speak on the podcast
- Rubbed out half the list because they would say no

- Created the podcast images

- Created the podcast images
- Shared with lots of people to get their thoughts

- Created the podcast images
- Shared with lots of people to get their thoughts
- Started recording episodes

- Created the podcast images
- Shared with lots of people to get their thoughts
- Started recording episodes
- Taught herself to edit - although she could pay an editor

- Created the podcast images
- Shared with lots of people to get their thoughts
- Started recording episodes
- Taught herself to edit - although she could pay an editor
- Started researching how to host it and when to launch



where did she
SELF SABOTAGE?



not
THE END

- End of the year



- End of the year
- Need to get organised for the year



- End of the year
- Need to get organised for the year
- Thinks the formating needs tweaking



- End of the year
- Need to get organised for the year
- Thinks the formating needs tweaking
- This created more work



- End of the year
- Need to get organised for the year
- Thinks the formating needs tweaking
- This created more work
- Plan to do it in summer



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- Summer comes not a good time with parents





- End of the year
- Need to get organised for the year
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- Plan to do it in summer
- Summer comes not a good time with parents
- Needs to get kids back to school do it in Oct



- End of the year
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- Someone else in her space brings out podcast



- End of the year
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- Thinks the formating needs tweaking
- This created more work
- Plan to do it in summer
- Summer comes not a good time with parents
- Needs to get kids back to school do it in Oct
- Someone else in her space brings out podcast
- Reviews whole thing







- Getting to late in the year



- Getting to late in the year
- Look at it in new year



- Getting to late in the year
- Look at it in new year
- Interviews way out of date - need recording again



- Getting to late in the year
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- Interviews way out of date - need recording again
- Nervous about reaching out again



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- Nervous about reaching out again
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- Easter is coming bad time the kids are off





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- Getting to late in the year
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- Easter is coming bad time the kids are off
- Plans for May / June
- Competitor brings out a video series with similar content



- Getting to late in the year
- Look at it in new year
- Interviews way out of date - need recording again
- Nervous about reaching out again
- Plans for March
- Easter is coming bad time the kids are off
- Plans for May / June
- Competitor brings out a video series with similar content
- Freaks out starts questioning if she should do YouTube





- Rethinks the whole thing



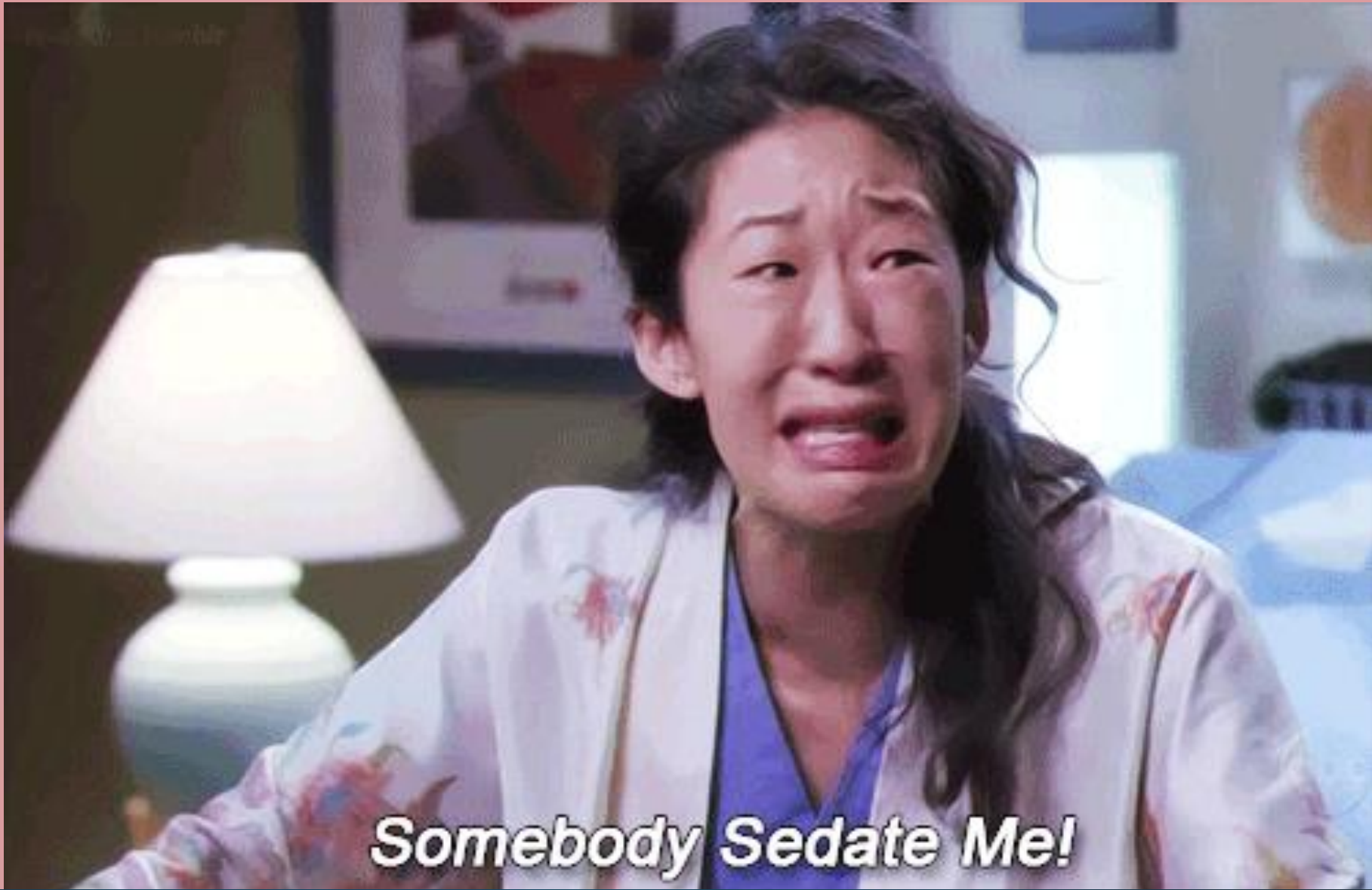
- Rethinks the whole thing
- Decides to stick with it but had new ideas that she could include - change of format



- Rethinks the whole thing
- Decides to stick with it but had new ideas that she could include - change of format
- Will will re-do interviews after summer



- Rethinks the whole thing
- Decides to stick with it but had new ideas that she could include - change of format
- Will re-do interviews after summer
- See's a Reel saying podcasts are dead





Self-sabotage is when you drill holes in your own ship because the trip is going so well that you feel uncomfortable because someone or something taught you that you don't deserve smooth sailing.



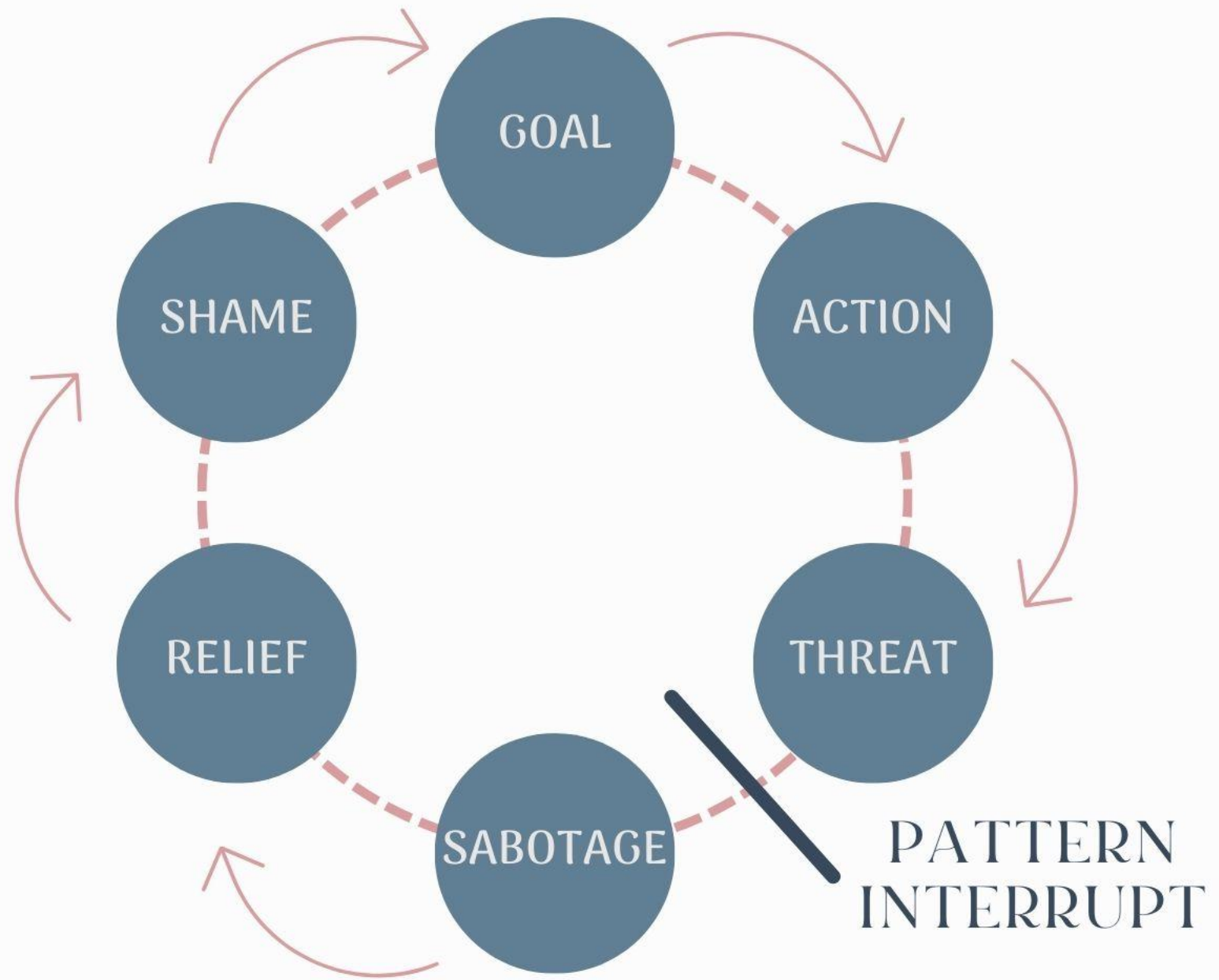
JON ACUFF

Signs of Self Sabotage

- Lack of integrity to your self
- Procrastination
- Overindulgence / addiction
- Initiating conflict
- Self criticism
- Not taking action
- Acting to your disadvantage
- Comparison
- Imposter syndrome
- Disorganisation
- Negativity
- Creating or joining in on drama
- Performing below your capabilities
- Being indecisive

why the hell do we
SELF SABOTAGE?





why the hell do we
SELF SABOTAGE?

Our brain is
KEEPING US SAFE

Why we Self Sabotage

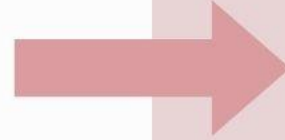
- Perfectionism
- Fear of failure
- Fear of embarrassment
- Fear of success
- Fear of loss of safety
- Fear of resentment
- Fear of shame
- Feeling of inadequacy
- Having a low self-worth
- Fear of criticism

What will
happen if you
hit your goal?

What will
happen if you
hit your goal?

What fear are
you trying to
avoid?

Want to launch a new service



Fear of failure

Want to launch a new service



Fear of failure

Want to go live on instagram



Fear of embarrassment

Want to launch a new service



Fear of failure

Want to go live on instagram



Fear of embarrassment

Want to bring on a team?



Fear of loss of safety

Want to launch a new service



Fear of failure

Want to go live on instagram



Fear of embarrassment

Want to bring on a team?



Fear of loss of safety

Want to start a podcast



Fear of criticism

Want to launch a new service



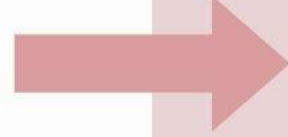
Fear of failure

Want to go live on instagram



Fear of embarrassment

Want to bring on a team?



Fear of loss of safety

Want to start a podcast



Fear of criticism

Want to be more vulnerable



Having a low self-worth



IF THE END RESULTS
FEELS THREATENING
OR UNSAFE IN ANY
WAY TO THE
UNCONSCIOUS MIND.

YOU WILL SABOTAGE



how to
STOP!



1 NOTICE THE PATTERN!

How are you self sabotaging?

What are your go to patterns?

Where is it showing up?



2 QUESTION WHY

How is this keeping me safe? What am I trying to protect myself from? What feelings am I trying to avoid?

3 REWRITE THE STORY

What would I do if I didn't feel that way?

How could this look different?

4+ PLAN A 1% SHIFT

When this comes up again what 1% shift can you take?

What can you put in place to not engage with the saboteur?



5

PRACTICE SELF INTEGRITY

Find ways to build trust with yourself, and keep a record of all the times you do.

this work
TAKES TIME

it's a muscle that
NEEDS
BUILDING



You will get out of your own way

- Move out of your comfort zone
- Stop playing small
- Go after the big opportunities
- Achieve your goals
- Be proud of yourself
- Earn more money
- Live a fuller and happier life



want some
HELP?



TERESAHEATHWAREING.COM/SS

Grateful

CompTIA[®]
COMMUNITY

THANK
YOU!





Executive Council Expression of Interest





Register Today
EMEA Member and Partner Conference
London 21-22 October 2024



Decision



14:30 – 15:00	CompTIA Resources: MSP Guidebook
15:00 – 15:30	Have You Got News For Them?
15:30 – 15:45	Networking Break
15:45 – 16:30	Mastering the Art of Overcoming Self- Sabotage to Unlock Your Full Potential
16:35 – 17:05	Minimising Churn with Onboarding and Customer Success Programmes – DIAMOND SUITE
16:35 – 17:05	CompTIA ISAO – DRUMMOND SUITE
16:35 – 17:05	Book Club: Olivia Donnell – EMERALD SUITE Scott Riley – BAR Area

AGENDA

WE ARE THE CompTIA® COMMUNITY



Scott Quilter

Techosaurus

Minimizing Churn

With Onboarding &
Customer Success Programs

SCOTT QUILTER - TECHOSAURUS



TechHarbor Managed Services



Vanguard Corporation

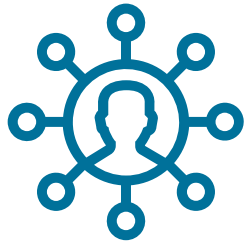
No contract renewal

What could have happened?

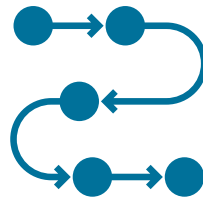
Course Breakdown



Understand Churn + What
It's Costing You



A Focus on Customer
Success



Impactful Onboarding



Ongoing Success
Programs

Understanding Churn & What It's Costing You



What is it?

“Churn” refers to the clients who don’t renew services within a specific timeframe.

Some churn is inevitable...

...most churn is something to minimize.

The Financial Impact

Of the MSPs reporting churn under 5% per year, more than 80% saw higher revenues.



A man in a dark suit and a woman in a light-colored blazer are standing in an office. The man is holding a tablet and pointing at the screen with a pen. The woman is looking at the tablet. In the background, there is a whiteboard with a diagram and some papers.

Lower Churn, Higher
Revenues

Referrals **create 65%** of all
new B2B business.

It **costs five times as much** to
attract a new client than to
retain one.

Lead With Data & Metrics

Churn Rate



clients at beginning
of [time period]

—
(minus)

clients at end
of [time period]

÷
(divided)

clients at beginning
of [time period]

Customer Retention Rate (CRR)



clients at end
of [time period]

—
(minus)

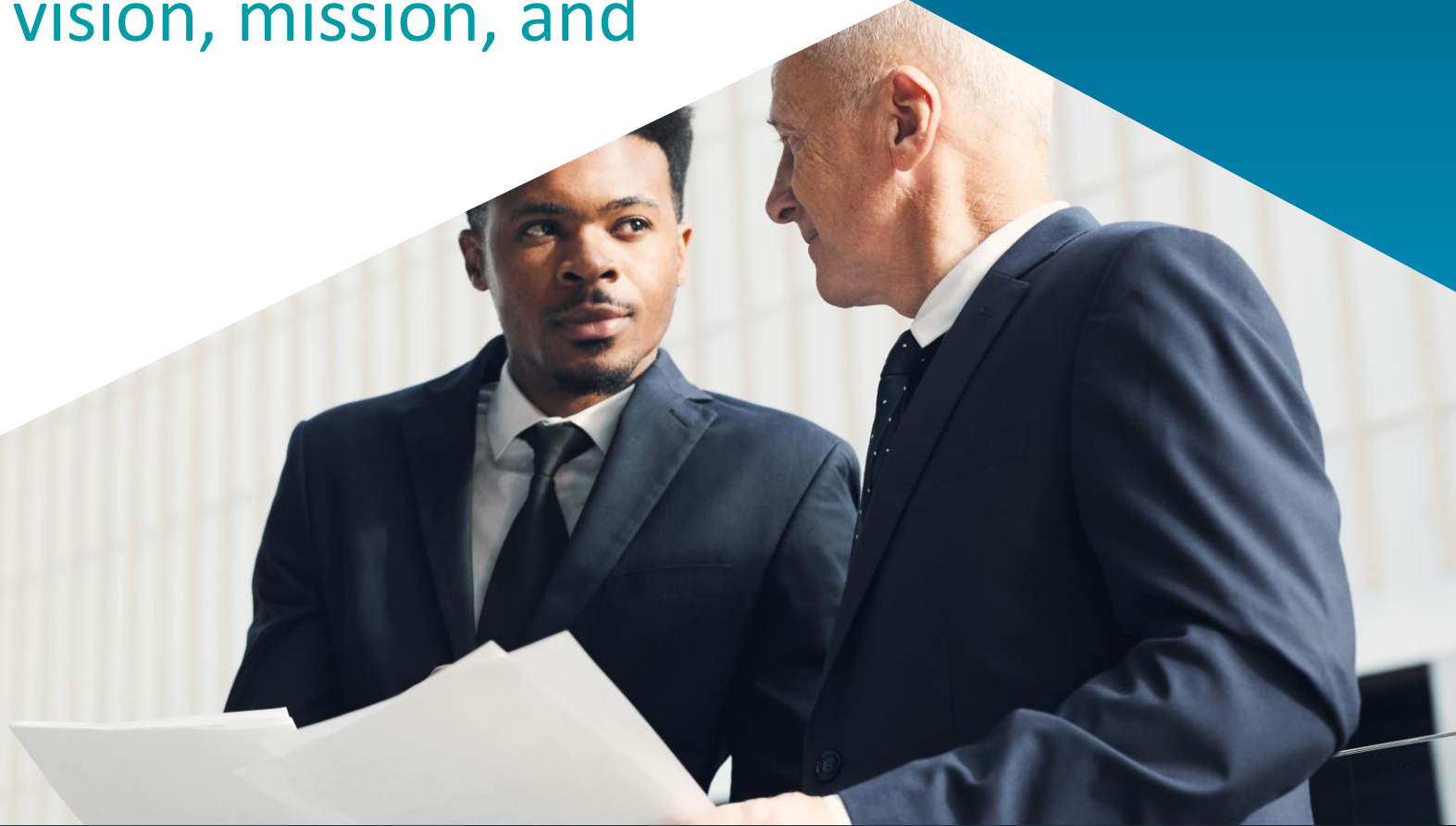
new clients acquired
during [time period]

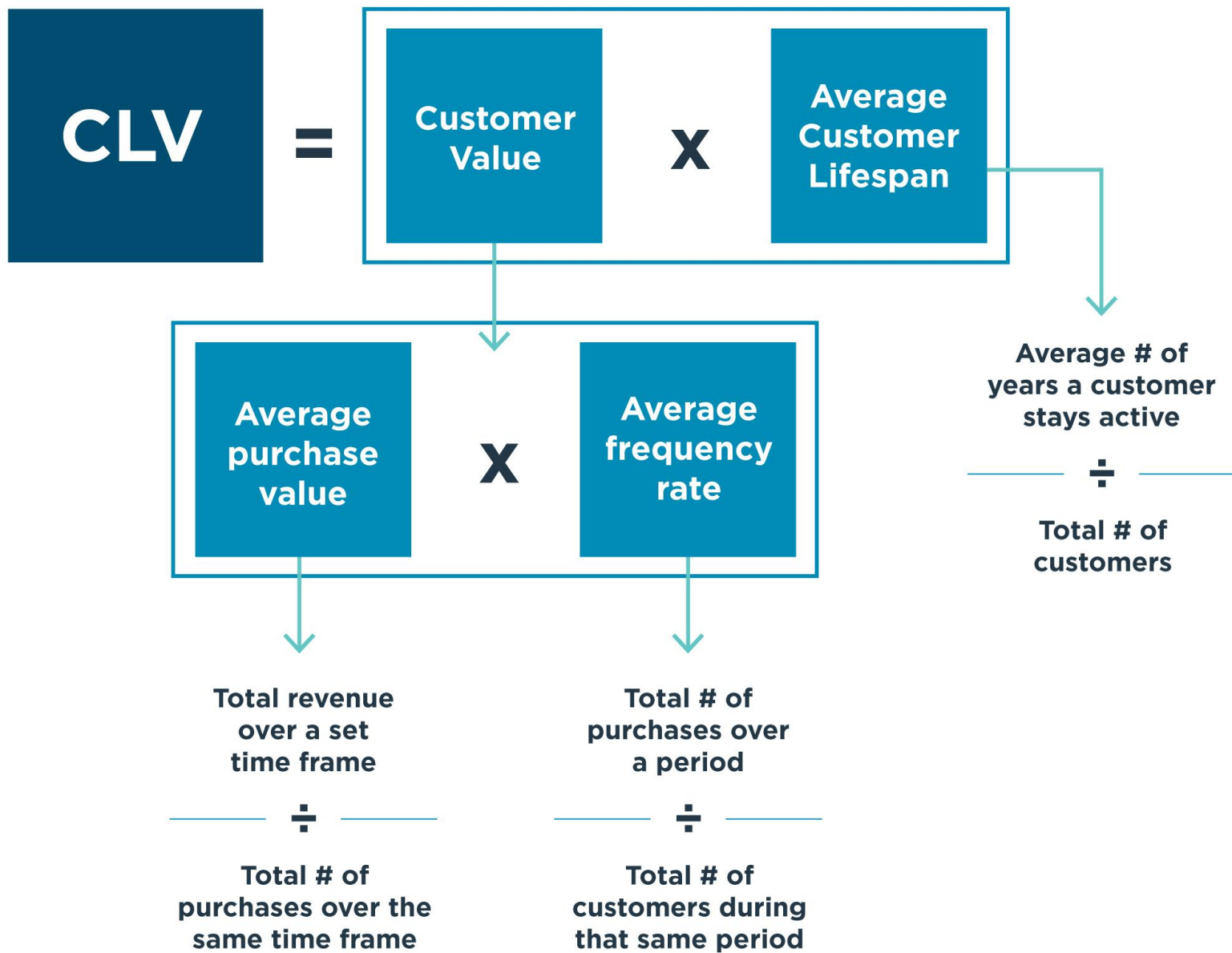
÷
(divided)

clients at beginning
of [time period]

*Depending on your MSP's size, it could be each month, quarter, or year.

Healthy retention and churn rates should align with your MSP's business vision, mission, and goals.





Why Clients Leave

Unresolved technical issue



Too slow to respond



Rudeness from the MSP rep



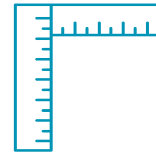
No/little added value



No personal touch



Apparent **lack** of technical skills



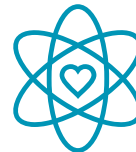
Inappropriate scope of services



Perceived dip in **service quality**



Lack of proactive engagement



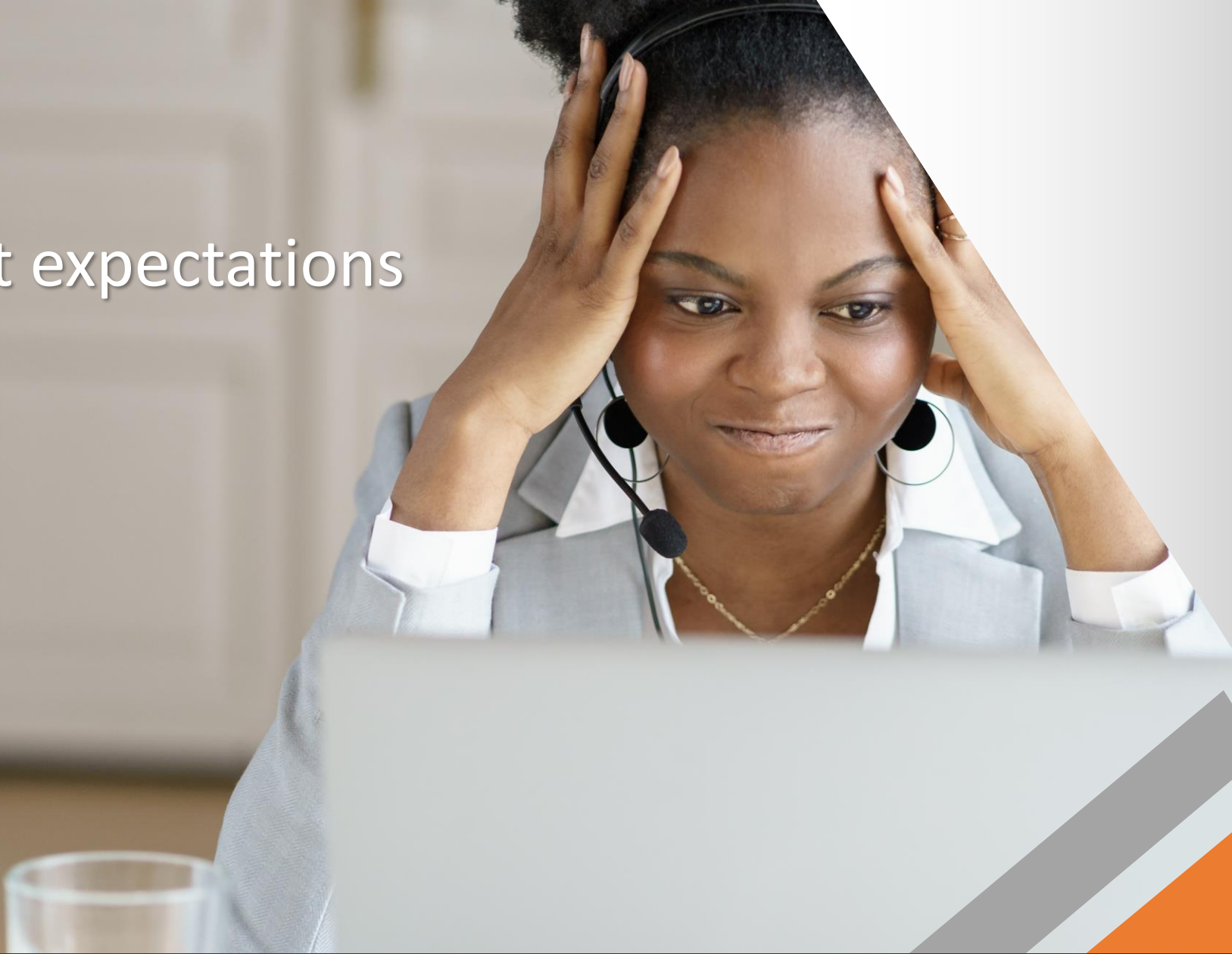
Put off by **corporate values**



Price uncompetitive

Issue

- Unmet expectations



Issue

- Lack of strategic alignment

Issue

- Communication gaps





Issue

- Relationship management

A Focus on Customer Success



A Focus on Customer Success



Selling to Vanguard

- Unhappy with current MSP, wanted quick change
- Package products like their current MSP
- Onboard faster





“I don’t want to be the bad guy.”

Traditional MSP

- Reactive approach
- Limited customization
- Basic documentation
- Ad-hoc solutions
- Basic communication

Customer Success Focused MSP

- Proactive engagement
- Tailored solutions
- Comprehensive documentation
- Strategic solutions
- Transparent communication

Focus on Success from the Start

Salesperson and Account Manager **would not need to say “no.”**

Explain success-driven approach and **address** Vanguard’s **deeper concerns.**



Customer Success Procedure



Sales Success



Onboarding Success



Ongoing Success

Sales Success





Sales Success

- **Business success discovery**
- Solution presentation
- Collaborative SLA discussion and finalization



Sales Success

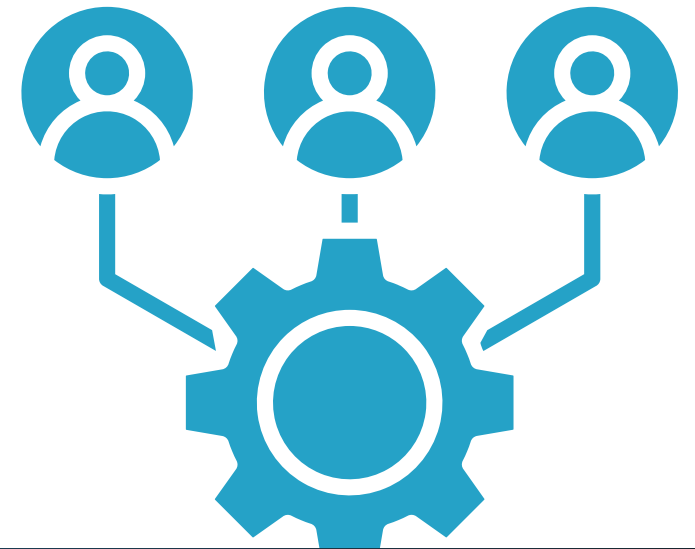
- Business success discovery
- **Solution presentation**
- Collaborative SLA discussion and finalization



Sales Success

- Business success discovery
- Solution presentation
- **Collaborative SLA discussion and finalization**

Onboarding Success



Why is impactful onboarding **important**?



What does impactful onboarding include?



Onboarding Success

- Welcome Kit
- Kickoff Meeting
- Network & System Assessment
- Documentation & Benchmarking
- Strategic Planning & Roadmap
- IT Infrastructure Setup/Implementation
- Employee Education

Welcome Kit

Could Include...

- Welcome letter
- Contract information (a copy of SLA)
- Onboarding instructions / detailed overview of the upcoming process
- Key roles throughout the client lifecycle
- Commitment statement to customer success and satisfaction
- Company swag and service catalog



Kickoff Meeting

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UK & Ireland

REGIONAL MEETING



Kickoff Meeting **TIPS**



Comprehensive Infrastructure Assessment

Documentation & Benchmarking for Success





Strategic Planning & Roadmap to Success



Infrastructure Setup/Implementation

CompTIA[®]
COMMUNITY
UK & Ireland

REGIONAL MEETING

Training

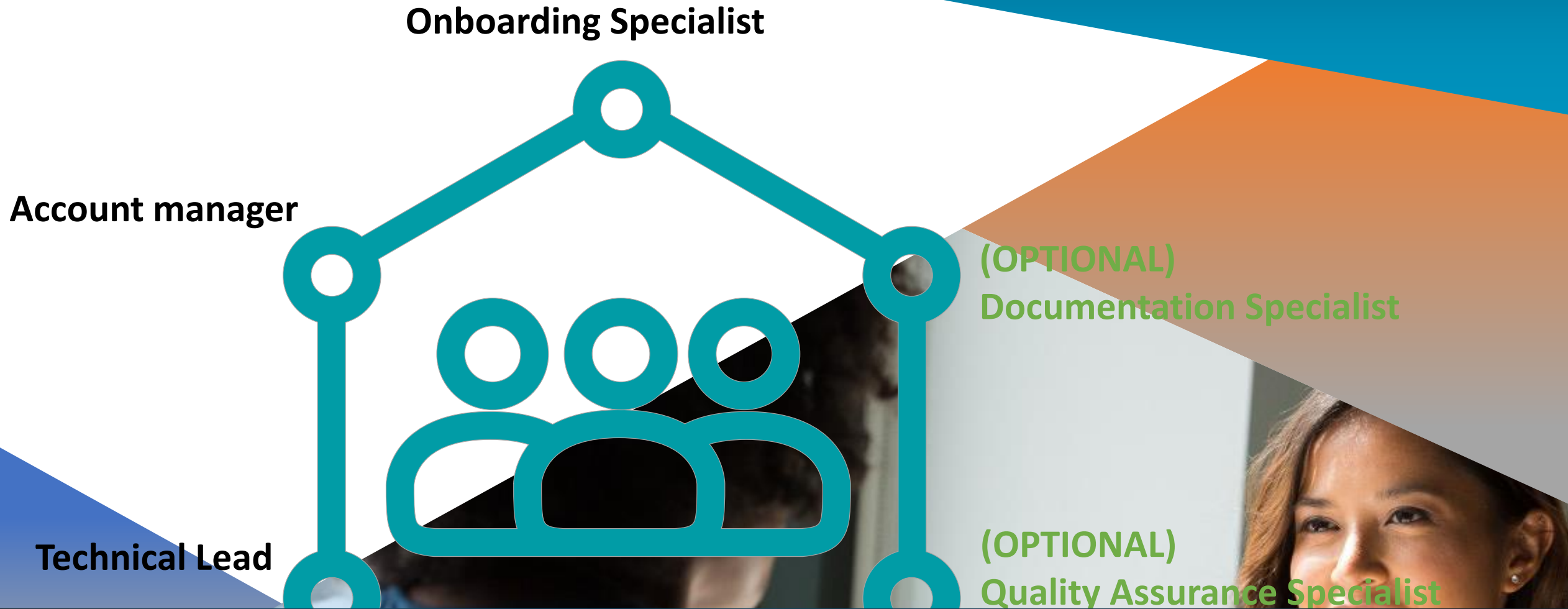


Managing Onboarding Success



The Onboarding Specialist
Position

Onboarding Success Team



A photograph of two men in a modern office setting. One man, wearing a yellow jacket, is seated and pointing at a circular chart on a table. The other man, wearing a blue shirt, is standing and leaning over the table, also looking at the chart. The background shows office shelves and a large whiteboard.

Onboarding Success Survey

Onboarding FAQ

What should onboarding timelines look like?

Ongoing Customer Success Programs





What is it?

A customer success program is an overarching framework that encompasses the overall approach and processes a company employs to ensure the success of its customers.

Scenario—Vanguard Corporation

- Unmet expectations
- Communication gaps
- Lack of strategic alignment, personal touch



What does customer success programs include?



Customer Success
Programs

- **Customer success plan**
- **Impactful onboarding**
- Proactive communication
- Value-added services
- Education & training
- Customer health monitoring
- Customer feedback/surveys
- Customer community building
- Renewal management

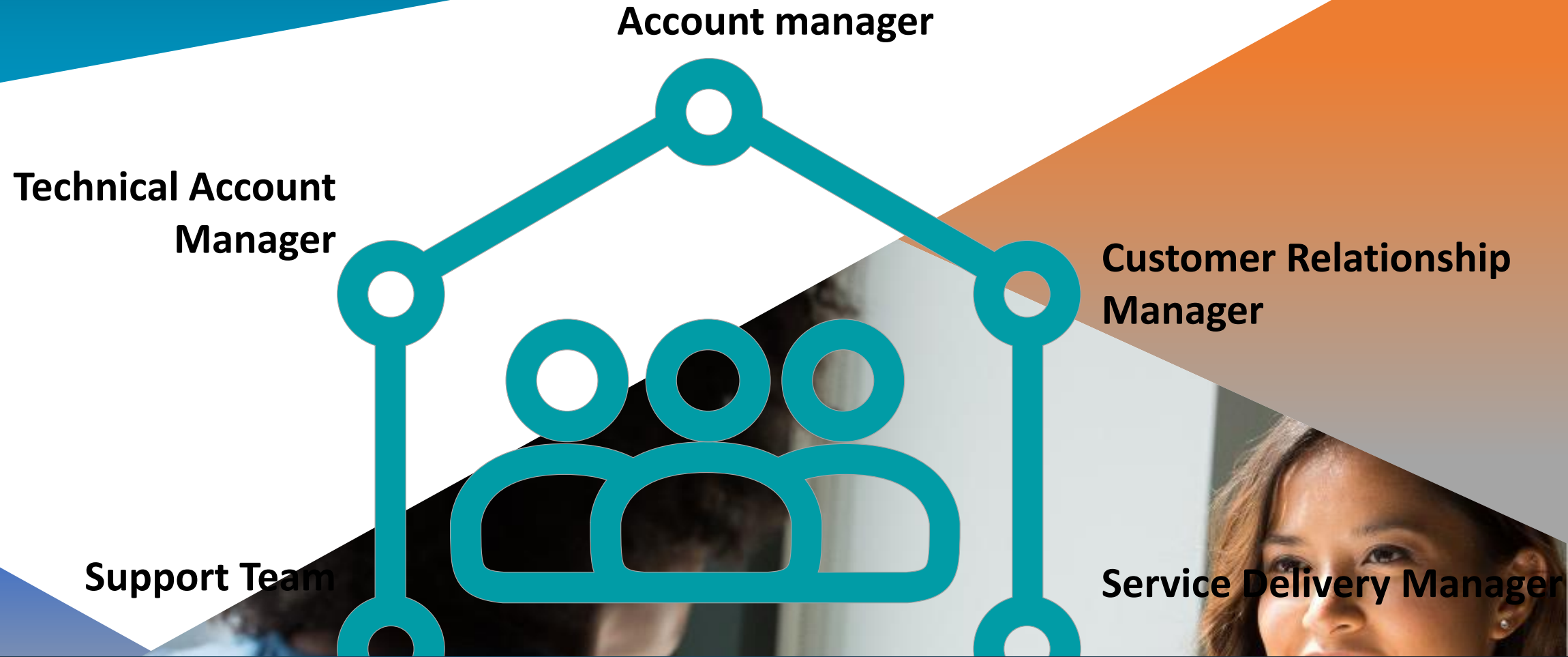


- Customer success plan
- Impactful onboarding

Customer Success
Programs

Includes a
strategic IT roadmap.

Ongoing Success Team





+



Goals

KPIs

What does customer success programs include?



Customer Success
Programs

- Customer success plan
- Impactful onboarding
- **Proactive communication**
- Value-added services
- Education & training
- Customer health monitoring
- Customer feedback/surveys
- Customer community building
- Renewal management



Proactive Communication

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✓ Regular Check-ins

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✓ Service Delivery Reporting

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✓ **Spotlight Business Success**

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✓ Maximize the QBR for Customer Success

What does customer success programs include?



Customer Success
Programs

- Customer success plan
- Impactful onboarding
- Proactive communication
- Value-added services
- Education & training
- Customer health monitoring
- Customer feedback/surveys
- Customer community building
- **Renewal management**

Renewal Management



**Ongoing Commitment to
Customer Success**

Thank You

Minimizing Churn with Onboarding &
Customer Success Programs

Course Workbook



WE ARE THE CompTIA® COMMUNITY



Patrick Burgess

Nutbourne Ltd



"ISAO? What is it?"

A deep dive into one of your most important CompTIA Community benefits



*An Information Sharing and Analysis Organization (ISAO) is a **trusted community** that **actively collaborates** to identify and **disseminate information** about **cybersecurity threats**.*

What is the CompTIA ISAO?

- We are a Trusted Community
- A place where EVERYONE can participate, contribute and ask questions
- There is a common goal for members to MITIGATE RISK
- The ISAO Gathers, Stores and Disseminates Valuable Threat Intelligence

Threat Intelligence specifically for Solution Providers
and the EcoSystem

*Cyber threat intelligence (CTI) is **knowledge, skills and experience-based information** concerning the occurrence and assessment of both cyber threats and threat actors that is **intended to help mitigate potential attacks** and harmful events occurring.*

Where do you get your information?

Some Examples...

CSO
FROM IDG



CYBER
SECURITY HUB



THREATLOCKER

techradar
The home of technology



Bitdefender



CONNECTWISE



HUNTRESS LABS

securityaffairs



SOPHOS



SECURITY
DAILY REVIEW

cybernews



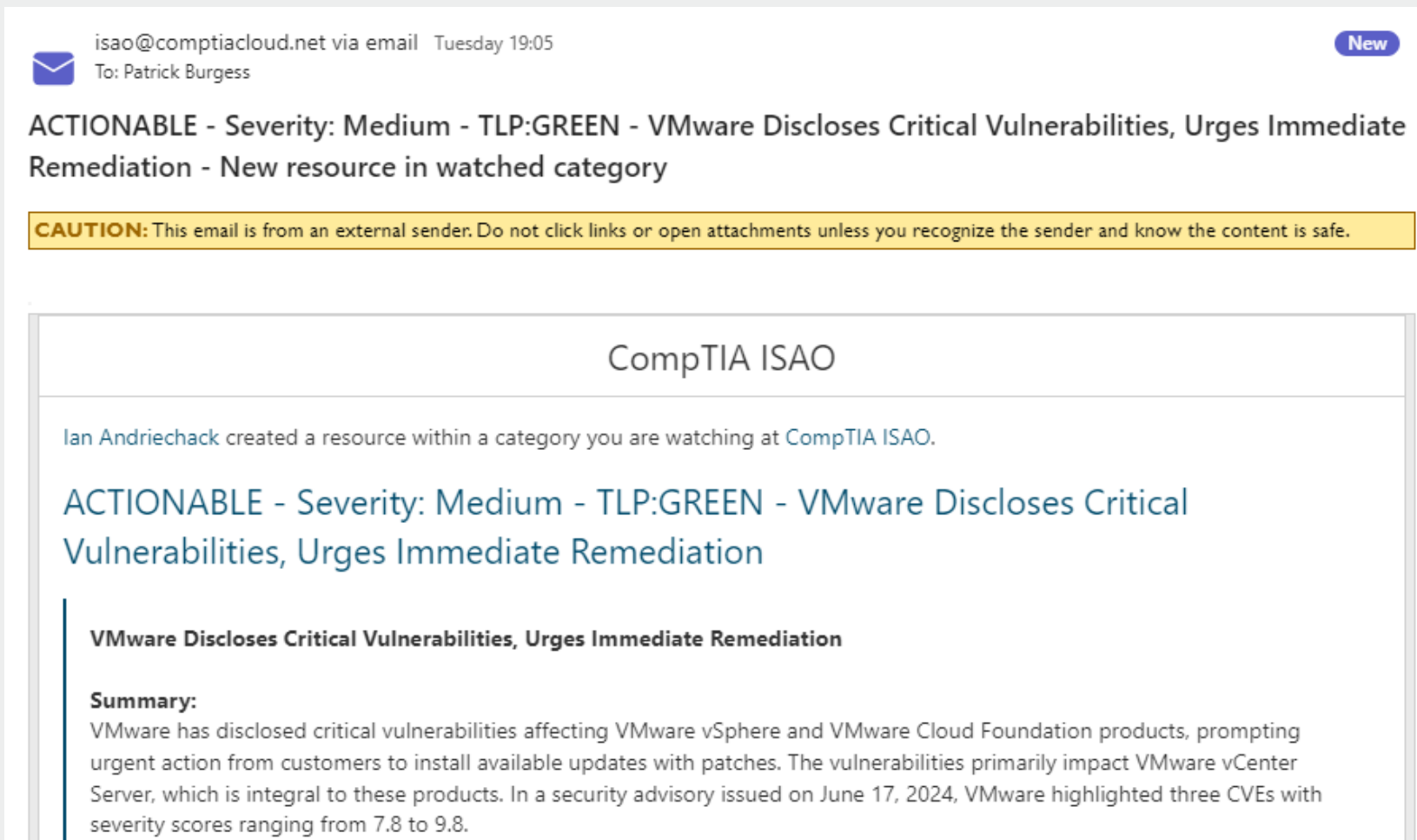
National Cyber
Security Centre

CompTIA
Community
CYBERSECURITY
PROGRAMS



INFSEC
EXCHANGE

Why Does My Organization Need the ISAO?



Why Does My Organization Need the ISAO?

isao@comptiacloud.net via email 05/06 19:50
To: Patrick Burgess

👍 ❤️ 😄 😮 🗨️ ⋮

ACTIONABLE - Severity: Medium - TLP:GREEN - Zyxel Addressed Three RCEs in End-Of-Life NAS Devices - New resource in watched category

CAUTION: This email is from an external sender. Do not click links or open attachments unless you recognize the sender and know the content is safe.

CompTIA ISAO

Cariza Schiavone created a resource within a category you are watching at [CompTIA ISAO](#).

ACTIONABLE - Severity: Medium - TLP:GREEN - Zyxel Addressed Three RCEs in End-Of-Life NAS Devices

Summary:
Zyxel Networks has released an emergency security update to address critical vulnerabilities in its end-of-life NAS devices, specifically NAS326 and NAS542 models. These vulnerabilities, identified as CVE-2024-29972, CVE-2024-29973, and CVE-2024-29974, allow attackers to perform command injection and remote code execution. CVE-2024-29972 is a command injection flaw.

Leverage what is learned from CompTIA ISAO

Share information on:

- Emerging security issues
- Industry/org impacts
- Your proactive work to address the issues





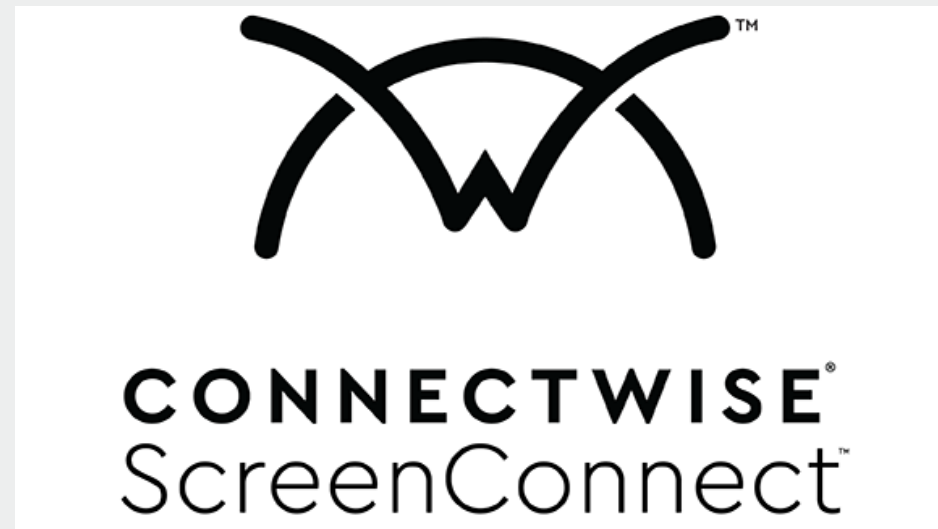
Information Sharing and Analysis Organization

“When you bring proactive intelligence on what you’re seeing in your client’s industry, you become your client’s trusted, go-to business risk consultant.”

Corey Kirkendoll

President & CEO | 5K Technical Services

Lets tell a story about the mid February 2024



This vulnerability was handled well by ConnectWise but on the 21st they needed to reach people and **fast!**



isao@comptiacloud.net via email 21/02 18:36

To: Patrick Burgess

ACTIONABLE - Severity: High - TLP:GREEN - ScreenConnect Critical Bug Now Under Attack as Exploit Code Emerges - New resource in watched category

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CompTIA ISAO

Jonathan Braley created a resource within a category you are watching at CompTIA ISAO.

ACTIONABLE - Severity: High - TLP:GREEN - ScreenConnect Critical Bug Now Under Attack as Exploit Code Emerges

Summary:

Technical details and proof-of-concept exploits are available for two vulnerabilities in ConnectWise ScreenConnect. A day after the vendor published the security issues, attackers started leveraging them in attacks.



CompTIA ISAO - Wayne Selk

To: Patrick Burgess



Reply



Reply all



Forward



Wed 21/02/2024 19:42

CAUTION: This email is from an external sender. Do not click links or open attachments unless you recognize the sender and know the content is safe.

CompTIA ISAO

Fellow CompTIA Community ISAO members, I wish we were communicating under better circumstances. If you were not already aware, ConnectWise announced a critical vulnerability in their **ScreenConnect** application. This bug impacts all versions of **ScreenConnect** 23.9.7 and earlier. ConnectWise has mitigated their two cloud environments. The on-premise instances are the biggest concern right now. Huntress reports approximately 3800 servers may be impacted. If you have a vulnerable server, go to the ConnectWise Trust Center Advisory and download the patch. You do not have to login to be able to patch your system. connectwise.com/company/trust/security-bulletins/connectwise-screenconnect-23.9.8 Please review the Threat Report in Breaking News Report titled "**ScreenConnect** Critical Bug Now Under Attack as Exploit Code Emerges" published today in the Cyber Forum for more information. We have also opened up information in a public space that can be shared with anyone. <https://forum.comptiaisao.org/threads/connectwise-screenconnect-exploit.6734/>. Let's all work together to minimize the impact of this issue and frustrate the bad actors. If you find yourself on the wrong end of a bad day, or know of another MSP in that situation, please fill out the form for assistance on the Emergency Response Team website at msp911.org Last, if there is any assistance either myself or the team can help you with, please let us know. Stay safe, stay healthy, and remain secure, -Wayne Wayne R. Selk, CDPSE | VP, Cybersecurity Programs | Executive Director, CompTIA ISAO Office: 630.678.8534 | Cell: 727.858.0052 | connect.comptia.org

information. We have also opened up information in a public space that can be shared with anyone. <https://forum.comptiaisao.org/threads/connectwise-screenconnect-exploit.6734/>. Let's all work together to minimize the impact of this issue and frustrate the bad actors. If you find yourself on the wrong end of a bad day, or know of another MSP in that situation, please fill out the form for assistance on the Emergency Response Team website at msp911.org Last, if there is any assistance either myself or the team can help you with, please let us know. Stay safe, stay healthy, and remain secure, -Wayne Wayne R. Selk, CDPSE

- Home
- CyberWeekly Podcast
- Breaking News! Podcast
- Cyber Risk Rating
- Forums** ▾
- News Feeds
- Resources ▾
- Sophos X-Ops Intelix
- Threat Reports
- Members ▾
- My.CompTIA
- Help Documents
- Preference Center

Forums > Security > Active Exploits Discussion/Recommendations

ConnectWise ScreenConnect Exploit

Wayne R. Selk · Feb 21, 2024

→ Jump to latest

+ Follow

Reply



Wayne R. Selk
Administrator

Staff member

CompTIA ISAO
Executive Steering
Committee

Cybersecurity
Trustmark

Emergency Response
Team Leadership
Committee

Feb 21, 2024

< □ #1

Please see the following regarding the active exploit of on-premise ScreenConnect servers. The CompTIA ISAO is making this information available to the entire industry as a service. We ask that you share this information as widely as possible to help respond. We will provide updates to this thread as they are released by ConnectWise.

The following was originally posted at 2:02 PM on Tuesday, February 20, 2024 in this [Breaking News](#) thread.

Wayne R. Selk said: ↻

Summary

Vulnerabilities were reported February 13, 2024, through the ConnectWise vulnerability disclosure channel via the ConnectWise Trust Center. There is no evidence that these vulnerabilities have been exploited in the wild, but immediate action must be taken by on-premise partners to address these identified security risks.

Click to expand...

Last edited: Feb 23, 2024

👍 Paula Kapacinskas, Charmaine McKeever and David Bork

🚩 Report

Reply



MJ Shoer • 1st

Chief Community Officer @ CompTIA | CEO @ CompTIA Spark | Building GL...
3mo • 🌐

CompTIA ISAO members, be sure to check the Cyber Forum for the latest threat report and updates on the ScreenConnect vulnerability. We have been in close touch with ConnectWise and others related to this incident and the latest actionable information is posted for your use in mitigating this threat. As a service to the industry, this information is TLP:GREEN for widest distribution. Let's all work together to minimize the impact of this issue and frustrate the bad actors.

Please see this post, which is being made available publicly to help everyone.

https://lnkd.in/ew_QB4Nr

We're stronger together and together, We are the #CompTIACommunity!



14



Like

Comment

Repost

Send



Patrick Burgess • You

Working with businesses to translate the endless stream of tech speak into us...
3mo • 🌐

MSP Friends using Screenconnect as an internally hosted platform. If you haven't already please note and apply the latest critical update. Connectwise have already patched Cloud Hosted platforms and released a patch swiftly for internal systems. CompTIA have opened up a public forum with further information through the ISAO:

ACTIONABLE Severity: High TLP:GREEN ScreenConnect Critical Bug Now Under Attack as Exploit Code Emerges

<https://lnkd.in/ep2BD4RK>

Stay safe and reach out on the forum or directly if you need any help.

#connectwise #screenconnect #msp #remoteconnect



ConnectWise ScreenConnect Exploit

forum.comptiaisao.org

Tim Schnurr and 14 others

Reactions



CompTIA ISAO

1,008 followers

3mo • 🌐

Join us TODAY as MJ Shoer, Chief Community Officer at CompTIA, and Patrick Beggs, CISO at ConnectWise, delve into the recent ScreenConnect vulnerability and provide valuable insights on how partners can enhance their #cybersecurity hygiene to safeguard against malicious attacks 🌐 📢

<https://lnkd.in/g4XfA8r7>

#CompTIACommunity

We Are The CompTIA
COMMUNITY

Securing Your Business:
A Live Discussion on
ScreenConnect Vulnerability

with Patrick Beggs & MJ Shoer

Tune in

February 22 | 3:00 PM ET



Webinar



6

1 comment • 1 repost



Like

Comment

Repost

Send

Raffi Jamgotchian

Founder & CTO | Triada Networks

Contributing Cybersecurity

Author—On Thin Ice

“Preempt the question, ‘**Are we affected?**’”



So, is it just a threat intelligence feed?

- A safe community forum to educate and learn in
 - No silly questions and all levels welcome
 - Active Exploits Discussion and Recommendations
 - Partner and Industry News Feeds
 - Threat Reports
- Monthly virtual meetups
- Weekly Cyber and Breaking News Podcast
- Cyber Risk Rating!!

A vendor neutral Cyber Community aimed at MSP's of all levels



A Framework built for MSP's

Actionable Takeaways – Join Us

- Join the CompTIA Community if not already a member
- Register for the ISAO – HINT! INCLUDED in Membership!
- Setup your profile, Say Hi in the Introduction forum

Actionable Takeaways – Get people involved

- Get your staff involved
- Make the Threat Intelligence visible:
 - Dedicate Mailbox
 - Teams Channel
- Get engaged in the discussions!
- Share what you are seeing or hearing back

Actionable Takeaways – Get vocal!

- Attend the monthly meetups:
 - Find out how people are using the ISAO?
 - Whats new in the ISAO?
 - What problems are other MSP's facing?
- Tell other MSP's and partners to get involved

JOIN THE FIGHT

CompTIA.ISAO
Information Sharing and Analysis Organization



"ISAO? What is it?"

Questions?



CompTIA[®]
Community
CYBERSECURITY
PROGRAMS

The logo is part of a larger graphic on the right side of the slide. It features a large blue circle with a white center. Inside the white center is the text 'CompTIA Community CYBERSECURITY PROGRAMS'. The blue circle is surrounded by several concentric circles in shades of blue and green, some with dots. To the left of the main logo, there are several smaller icons: a green circle with a white dot, a gear, a shield with a checkmark, a bug, and a padlock. At the bottom left, there is a blue circle with a green outline and a small green circle inside. The background is light gray with a large, faint, stylized 'A' shape on the left and a grid of small dots on the right.

WE ARE THE CompTIA® COMMUNITY



Olivia Donnell
Quest Software



Scott Riley
Cloud Nexus



17:15 – 18:00	Time to get ready for the Awards
18:00 – 19:00	Networking Drinks - BAR AREA
19:00 – 22:40	Awards Dinner – HORTON SUITE

AGENDA

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CompTIA
COMMUNITY



Dan Scott
ConnectWise

WE ARE THE
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Hollie Whittles

Purple Frog Systems

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Spotlight Awards Dinner starts at 7pm