

MSP bugle

THE MAGAZINE FOR
FUTURE-FOCUSED MSPS

Vol 3, Mar 2025

Exclusive expert insights from

*Mark
Copeman*

*Heather
MacDonald
Alford*

Exclusive
Conversation
with Ryan Walsh
& Juan Fernandez



JUSTIN ESGAR

CEO, VIRTUA CONSULTING &
ACES CONFERENCE

LOVE

"Stronger when
we stand together"



SuperOps Community,
now an essential for MSPs



Quotable QUOTES



Pete Matheson,
*Owner, Not a Business
Coach*

"Don't grow just for the sake of growing. Ask yourself: What do you actually want from your business? Once you know that, you can plan back and figure out the steps to get there."



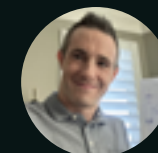
Matt Solomon,
*Co-founder and CBDO,
Channel Program*

"Leveraging your network isn't about transactional connections, it's about building meaningful relationships that lead to mutual success."



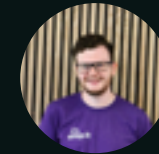
Claire Jenks,
Director, Jenks Creative

"The hardest thing is realizing that as a business owner, you are the most important part of your business. If you collapse, everything falls apart. Take care of yourself first."



Mat Kordell,
*Co-founder and COO,
CyberStreams*

"Complete transparency, be an open book (when being part of an M&A process). We're going to find out everything anyway along the way, but if you make it hard, if you try to hide things, if you obfuscate, that's just going to poison the conversation."



Alex Harvey,
*Managing Director, Snap
IT*

"Outsource what you don't know or don't want to do. That was a game changer for me."



Todd Kane,
*President, Evolved
Management Consulting*

"MSPs are losing clients due to project failures more than service failures, which underscores the importance of getting projects right."

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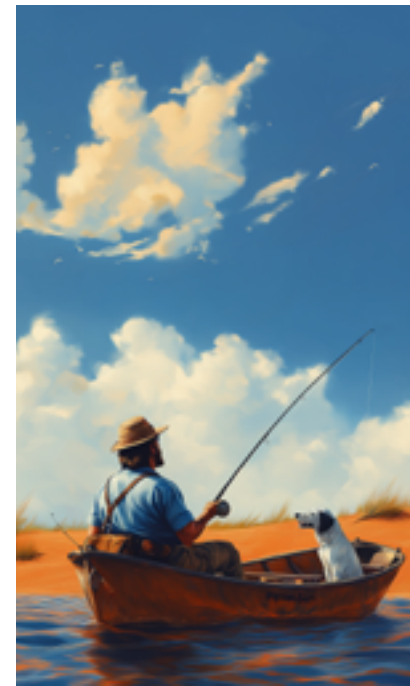
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Arvind Parthiban

Arvind Parthiban
Co-founder & CEO, SuperOps

I am excited to present to you our latest edition of the MSP Bugle magazine, crafted to inspire and empower Managed Service Providers (MSPs) like you.

As a fellow business founder, I understand the myriad challenges and triumphs that come with building, running and scaling a business. Our mission with this magazine is to be more than just a source of information - we aim to be a steadfast companion in your entrepreneurial journey, offering insights that fuel your growth and success.

In this edition, we dive into the multifaceted lives of MSP business owners. Often, in the pursuit of excellence, diverse passions are set aside. However, our cover story on Justin Esgar exemplifies how integrating various interests can lead to unparalleled success. His narrative underscores the power of embracing change and recognizing the interconnectedness of different business facets.

We also feature the inspiring journeys of Joe Burns, Jacob Bepalec, George Ballane, and Chris Pratt. Their stories resonate with a common theme: the profound impact of self-belief. These narratives serve as a testament to the remarkable influence that faith in oneself can have on building a thriving business.

Additionally, we bring you insights from Pax8's Co-founder, Ryan Walsh, along with expert columns by Mark Copeman on Marketing and Heather MacDonald Alford on MSP Finance. These pieces are tailored for MSP business owners aiming to scale and achieve sustainable growth.

May the stories and insights within these pages inspire you to reach new heights.

Letter from **THE** **EDITOR**

If you love what you do, you'll never work a day in your life.

I am fortunate to speak with many MSP business owners, and this proverb often comes to mind when I hear them discuss their work.

Most MSP business owners turn to entrepreneurship because they genuinely enjoy their work and want to help businesses manage their IT better. In this edition, among other insights and lessons, we have tried to capture this joy of doing what they love.

When I spoke to Justin Esgar, Founder of Apple devices-focused MSP Virtua and the ACES Conference, he told me, “The warm and fuzzies that I get from people coming to me, because they know how much work I’m putting into it, this has been the greatest thing ever.”

Finding joy in their work, pushing themselves to achieve more, creating value for employees and clients, and accepting the mistakes they have made, learning from them, and ensuring they don’t make the same mistakes—these themes can be seen repeatedly in the MSP stories in the pages that follow.

MSP founders featured in this edition, like Justin, Joe Burns, Jacob Bepalec, George Ballane, and Chris Pratt, have also generously shared the lessons they have learned as they built their companies. This is another common thread I have seen—MSP founders are open about the mistakes made and lessons learned, so others can benefit.

I hope you find answers to questions you may have had as you build and scale your MSP business. I would love to hear from you about what you think of this edition or if you have any suggestions for future editions. Do write to me at the email below.

Radhika P Nair

Radhika P Nair,
Editor, MSP Bugle
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The **CHANGE MAKERS**



The
**CHANGE
MAKERS**

**METHOD IN
MADNESS –
JUSTIN ESGAR’S
TALE OF FINDING
FULFILMENT IN
MULTITASKING**

Company	Location	Team	Specialization:
Virtua Consulting	New York	14	Apple Consulting, Apple Device/ Hardware Service, Apple Training

Justin Esgar's entrepreneurial resume is dedicated to challenging conventional wisdom and proving that there is no single roadmap to success. As the owner of Virtua Consulting, a thriving Apple-focused MSP, and the founder of the ACES Conference, Justin has become a recognized figure within the IT industry. His journey, however, is far from the stereotypical entrepreneur's tale. It's a story of calculated risks, a relentless drive, and a deep-seated commitment to community, all fueled by an unwavering belief in his own vision.



It is also about finding the method in the madness - take a quick glance at the repertoire of work Justin has done and it can seem like he has dabbled in a bit of everything. Justin, however, says everything he has gotten into, be it the Conference or the All Things MSP podcast he co-hosts with MSP veteran Eric Anthony, has been for a very good reason, and everything he does is interconnected. To find out how, read on.

"For the first six months, I leveraged every relationship I had," says Justin. Virtua was a one-man shop the first three years. He got the certifications required and became an Apple Consultant, and turned into a Consultant for Consultants, picking up work from other Apple Consultants.

Everything's interconnected

In those "ancient days of tech", work tickets were still on paper. This is 2010 we are talking about. For legal reasons, you had to retain these tickets for seven years. Justin says he was living in a shoebox apartment in Manhattan, and the paperwork tickets were becoming a problem. The iPad had just been launched and one day Justin was tracing his name

A Leap of faith

The year 2008 marked a turning point in Justin's life. Justin had just moved into a more expensive apartment in early January, and was all set to go on a company-sponsored trip to Macworld (the tech event) in San Francisco, when he was let go from his job. Despite his personal turmoil, Justin attended Macworld, but found himself grappling with existential questions.

"Went to California, no girlfriend, no job. I cried all weekend. I spent most of California (the trip) texting my mom, 'why am I here?' I didn't know anyone there," recalls Justin. But, he came back with a plan.

Justin sought advice from his former boss, who encouraged him to pursue his entrepreneurial aspirations. Inspired and emboldened, Justin took the plunge and officially launched Virtua, his IT consulting company, in 2008.



I came back with a plan.



over and over again with his finger on the iPad screen when he got an idea. He created SignMyPad - the first iPad PDF form filler application. SignMyPad allowed you to fill in forms and sign your name right to your PDFs.

This marked the birth of Autriv, Justin's software development firm. With the app performing well, Justin was asked to speak at a new tech conference in California. He did a longer version a year later and started speaking at more conferences.

As he became a regular on the conference circuit, he networked with more Apple Consultants and realized that everyone had their

own way of running their business. He noticed a gap in the market - a lack of resources and training focused on the business side of IT consulting, specifically tailored for Apple-focused professionals.

The \$20,000 lesson

The ACES Conference or the Apple Consultants' Educational Seminar is now an annual event designed to provide Apple consultants with the knowledge and tools needed to build successful and sustainable businesses. He envisioned ACES as a platform for sharing best practices, fostering collaboration, and elevating the professionalism

of the Apple consulting community. The first ACES Conference, however, threw Justin a curveball.

"I thought it was going to be the greatest thing for all the Apple Consultants. I needed 250 people to attend to break even, but only 50 turned up. I had to pay the hotel arbitrage for 200 rooms that I did not fill. I owed them \$20,000 on top of everything else," remembers Justin.

Justin could have easily abandoned the project. But Justin's determination and belief in the value of ACES fueled his persistence.

A labor of



Despite initial setbacks, Justin persevered with ACES, driven by the overwhelmingly positive feedback from attendees and his own unwavering commitment to the project. He poured his heart and soul into the conference, meticulously curating content, securing top-notch speakers, and fostering a welcoming and supportive environment. "The warm and fuzzies that I get from people coming to me, because they know how much work I'm putting into it, this has been the greatest thing ever. I've had people who come to me and say, you're the only conference I need to go to, and that's amazing to me," he says.

ACES is 10 years old now and has evolved into more than just a conference; it became a cornerstone of Justin's business and a testament to his dedication to community building. While he admits that ACES has never been a significant profit center, he describes it as a "labor of love," a project that brings him immense personal satisfaction and has had a profound impact on the lives and businesses of countless Apple consultants.



Acquisitions and expanding horizons

Continuing with the theme of interconnectedness - ACES not only fostered a vibrant

"The three companies that we've acquired actually were all people who have come to my conference. That's how I met them. They came to me and the conversation started with, "How do we grow? How



This platform allowed him to connect with a wider audience, discuss industry trends, share insights, and offer advice to fellow MSPs, solidifying his position as a thought leader and influencer.

A far from normal trajectory

"My trajectory is not a normal one in any way or form. But it's also about seeing opportunities and just running with them. Because I'm OK with taking that risk," says Justin.

While Justin enjoys working on multiple projects - he also authored a book called *Appitalize on Your Idea: Bringing Any Idea to Fruition* - he

realized he needed a bit more

community but also served as a catalyst for Justin's business expansion. Through the connections he made at the conference, he identified opportunities for growth through strategic acquisitions. In 2020, he acquired his first company, based in Des Moines, followed by another acquisition in Columbia, Missouri. Both companies were Apple consultancies, allowing Justin to expand Virtua's geographic reach and service offerings. Later, he acquired a training company, further diversifying his portfolio and strengthening his position within the Apple consulting ecosystem.

do we get bigger? How do we become more like Virtua?" And I said the way to do that is by joining (Virtua), be a part of it," he says.

Justin's desire to share knowledge and contribute to the broader IT community extended beyond ACES. In a strategic move to expand his reach, he partnered with Eric Anthony to host the "All Things MSP" podcast.

Justin met Eric through the industry network and the latter asked him to come on board as a co-host.

structure.

"In the last couple of years, between Virtua and my software and the hardware and all these things, I decided to make it really easy for myself. I rebranded everything as part of the Virtua Consulting Group. So we have one company that handles everything with the exception of the ACES Conference," says Justin. The business is now close to the \$2 million revenue mark.

The target is to reach the \$10 million mark, and for that Justin has got his task cut out.

Justin intends to deepen focus on security and compliance. He is also planning more acquisitions. With the companies he has acquired so far, Justin is able to

offer three key pillars of support. The first acquisition was another consulting company, helping him deepen his consulting offering. His Columbia, Missouri acquisition gave him access to an Apple authorized service providership. His clients can just ship their devices to be repaired to Missouri and not have to worry about finding and contacting a service center where they are. The third acquisition was a firm that offers Apple training. Justin admits he has not focused on the

training wing - something he wants to correct this year. With these, Virtua covers consulting, hardware/device service and training.

The new acquisitions he is planning are meant to strengthen the team. Justin hopes to double his team from the current strength of 14. The Iron Man fan doesn't believe he will be able to change the way he works, and doesn't want to. "If anybody saw the madness happening inside my head, they'd be like, that kid needs to go to an insane asylum. But it works for me, and I get it done," says Justin.

In the end that's what matters for all of each of us - does this work for me? Justin's found what works for him, and may it always work for him.



The Importance of
Adaptability and
Embracing Change:

Justin Esgar's

PERSPECTIVE



Justin believes that the ability to change is crucial for success in the ever-evolving MSP landscape. He emphasizes this point by stating, "The inability to change is what has to change by people, by companies, by MSPs." He argues that clinging to outdated processes and resisting new technologies will ultimately lead to failure.

He observes that many MSPs try to force clients to operate within their pre-defined parameters instead of adapting to the clients' changing needs and the current technological landscape. He uses the analogy of a sandbox, where some MSPs create strict rules that clients must follow. This rigid approach, he cautions, will likely result in clients choosing to "take the highway" and seek services elsewhere.

This need for adaptability extends to marketing strategies as well. He observes that platforms like LinkedIn, once prime locations for business advertising, are becoming oversaturated with content, diminishing their effectiveness. MSPs, he suggests, need to be willing to explore new platforms and tailor their strategies to reach their target audience effectively.

Justin's views on change underscore a critical lesson for MSPs: to thrive in an industry marked by constant evolution, a willingness to adapt, embrace new technologies, and adjust strategies is essential.

INFOCUS

Company	Location	Team	Specialization:
Reformed IT	UK	11	Legal, Finance, Compliance, and Manufacturing



BURNING BRIGHT

Joe Burns may have had a serendipitous entry into the world of IT, but he ended up falling in love with the industry so much so that he started an IT business not once, but twice!

A chance conversation with a school friend made Joe, Co-founder and CEO of UK-based MSP Reformed IT, tell his school careers advisor that he wanted to get into IT and become a systems analyst.

"I had no idea what that was, but he explained that it's someone that works with computers all day and gets paid well for it. So I just went down to the careers advisor and said, I want to become a systems analyst. I just stole his idea basically," Joe recalls with a chuckle.

The tale of a second-time MSP founder

However, he almost reconsidered when the advisor said he needed to go to college for this. Joe was not very academically inclined, but he did go to college and specialize in IT. After spending three years working in the field, his colleague and Joe decided to embark on their entrepreneurial journey, establishing Pyranet in 2005.



The cloud's evolution presented new opportunities.

The early days of Pyranet

As a first-time entrepreneur, Joe did find it challenging starting and building a business. One of the challenges was that Joe and his co-founder had no business experience and they were very young. Joe was just 21 when he started Pyranet and functions like sales and marketing were totally alien concepts. "I do remember some early conversations with prospective clients and feeling really uncomfortable and out of place, trying to talk to people," says Joe.

However, he did get many of the aspects of building a business right. It was the nascent days of the MSP industry, and yet Pyranet adopted a per-device monthly billing model, eschewing the prevalent break-fix approach. Unsurprisingly, while the company experienced consistent year-on-



year growth, including during the 2008-2009 recession, its progress was steady rather than explosive.

business while its trajectory remained positive. However, their growth persisted, and the cloud's evolution presented new

"We did grow every year. Every single year of that business in its entirety, we had growth, even during the recession of 2008-2009, we were still growing as a business, but it was not as intentional as I've seen in the latest business in Reformed," Joe reflects. It took 11 years for Pyranet to reach the milestone of £1 million in revenue.

The winds of change

As cloud technology began to reshape the IT landscape, Joe and his business partner were concerned about the potential disruption to their traditional server-centric model. They entertained the idea of selling the

opportunities. Ultimately, the decision to sell Pyranet stemmed from a divergence in the partners' aspirations for the future of the business. "When you're in a business partnership, you have to be very aligned and going in the same direction. And we were finding between myself and my business partner that we wanted different things from the business. So ultimately, the reason we ended up selling was because we had a misalignment of our future goals. And it meant that one or the other of us had to step away or both of us would have to exit the business for us to achieve what we wanted," Joe explains.

Navigating the sale

The process of selling Pyranet was a demanding and protracted one, involving extensive due diligence, legal negotiations, and the constant juggle of managing the sale alongside the day-to-day operations of the business. "There's no point in sugarcoating it and saying it's a really nice, easy process because it's not. It takes a lot of effort, manhours, and a lot of stress. And the process dragged on," Joe candidly states. The other challenge was that while they were working on the sale, they were also trying to keep the businesses running. While acquisitions can happen much faster, in Pyranet's case from start to finish the process took 12 months.

Joe decided to stay on with the

acquired entity as he still saw a lot of opportunity for growth. He remained with the company for three years, overseeing a 60% growth in that period.

Reformed IT – a new chapter

After exiting the business in 2019, Joe set up his own consultancy firm to help businesses grow. Initially called 5BI and later renamed MSP Blueprint, the consulting firm focused on process improvement and automation for businesses.

While Joe harbored a desire to continue building upon Pyranet's success, others in the industry started reaching out to Joe seeking advice and help to start their own MSPs. "It was actually not really about me. It was about other people within that business that had mentioned to me that they wanted to start an IT business of their own," says Joe, a Manchester United fan.

Joe also wanted to prove to himself that he had it in him to build an MSP better the second time around. "I'd set the bar and I wanted to see if I could beat that. Can I be part of something better this time around and do it faster, do it better?," he says.

For Joe, Reformed IT presented a chance to apply the lessons learned and to test his ability to build a company that surpassed the achievements of Pyranet.

Key takeaways:

From Pyranet to Reformed IT

Reformed IT's trajectory has been markedly different from that of Pyranet, a testament to Joe's evolved approach to building and scaling an MSP. Here are some key differentiators:

Intentional client selection:

From the outset, Reformed IT established a clear ideal customer profile and declined opportunities that fell short of their criteria, ensuring a focus on high-value, security-conscious clients.

Ambitious, data-driven planning:

Reformed IT embraced detailed business planning, setting ambitious goals and working backward to devise a roadmap for achieving them, underpinned by a deep understanding of financial metrics.

Comprehensive managed services:

Reformed IT abandoned the tiered service model in favor of a single, all-inclusive offering that covers all essential IT and security needs, eliminating the need for constant upselling and fostering client trust and loyalty.

Employee well-being as a priority:

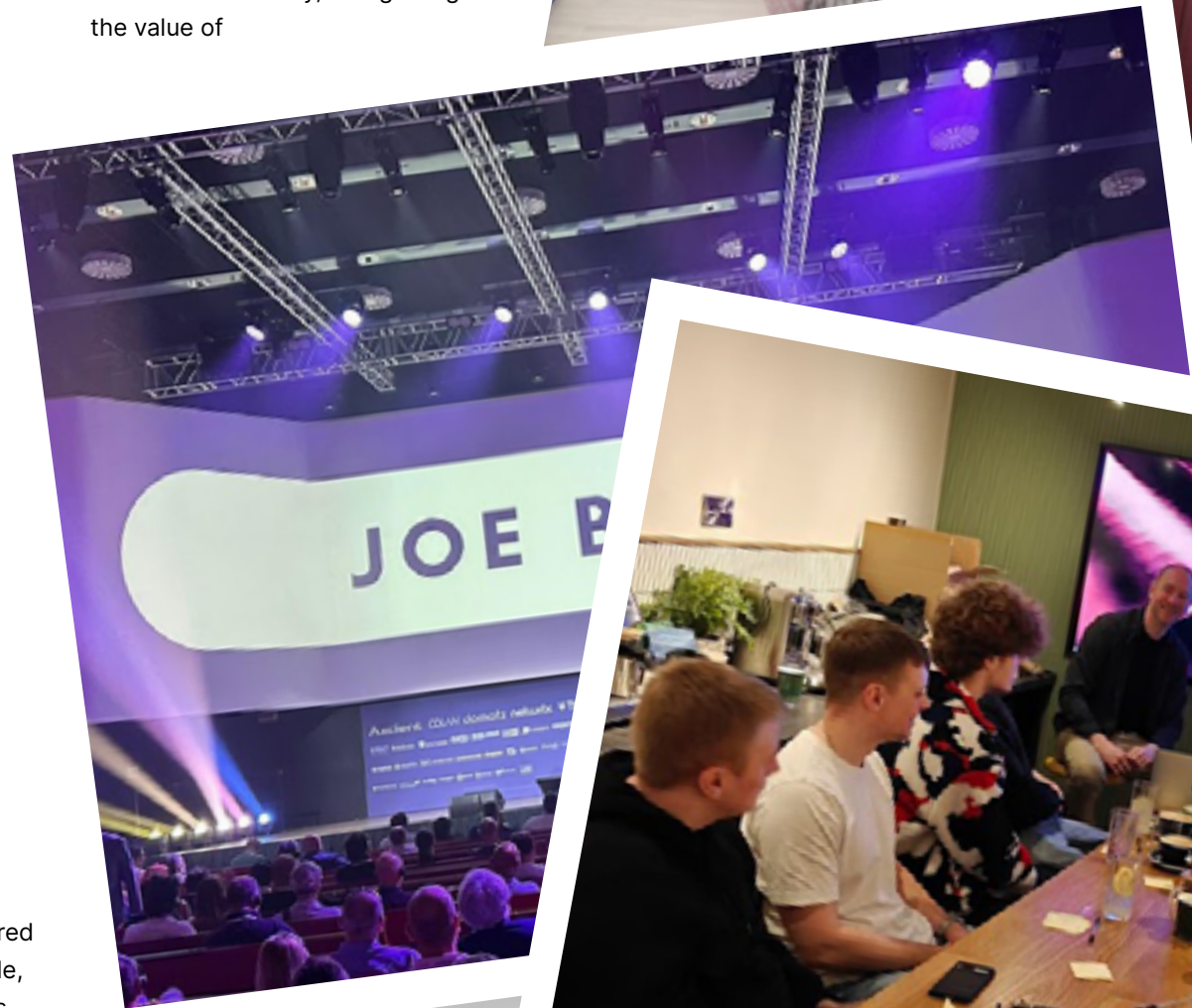
Recognizing the importance of a motivated and engaged team,

Reformed IT prioritized employee well-being through initiatives such as an EMI share scheme, a comprehensive health package, performance-related pay, and regular team activities.

Active community engagement:

Unlike his earlier approach of operating in isolation, Joe embraced active participation in the MSP community, recognizing the value of

networking, benchmarking, and knowledge sharing among peers.



The Reformed IT of today

In its fifth year of operation, Reformed IT has achieved significant milestones, demonstrating the efficacy of Joe's strategic approach.

- The company is on track to reach £1.9 million (\$2.45 million) in revenue for the financial year ending March 2025, a figure that took Pyranet 11 years to achieve.

- With a team of 11, Reformed IT boasts a lean and efficient structure, with capacity for further growth without requiring substantial hiring.

- The company serves 26 clients, a testament to its focus on high-value partnerships, resulting in a higher average revenue per client compared to industry norms.

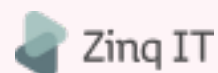
- Reformed IT has recently acquired its own office space, providing a tangible symbol of its growth and stability while creating opportunities to foster a positive and engaging work environment for its team.



Joe envisions continued growth for Reformed IT, aiming to reach a valuation of £10 million (\$12.9 million) within the next three years.

**BUILD
FOR THE
FUTURE!**

Company	Team	Specialization:
Zinq IT	10	Manufacturing, Engineering, Electronics, Textiles, Estate agents, and Accountancy firms



CHRIS PRATT'S RECIPE FOR MSP GROWTH



Chris Pratt, The Managing Director of Zinq IT, shares his journey in managed services. A trained chef, Chris found his calling in the world of IT services. He gained experience in both the public and private sectors before taking over an IT company, which he rebranded as Zinq IT in June 2019. Since then, Zinq IT has grown to a team of 10 employees, serving approximately 100 customers. In this interview with the MSP Bugle, Chris discusses the company's growth and future plans. Edited excerpts:

Q: Tell us about yourself and your company.

Chris Pratt: I'm the Managing Director and Owner of Zinq IT. I've been working in IT since I was 19, and I'm now 35. I used to be a chef, but the long hours and poor pay led me to pursue formal IT training. I started at the local council and then moved to the private sector, working for an IT company that provided services to an accountancy firm and its clients.

Following a management buyout of the accountancy firm, I took over its IT company in September 2017. It was just me and two employees at the start. In June 2019, we rebranded as Zinq IT. Since then, we've grown to a team of 10 employees, serving around 100 customers. In 2020, we acquired another IT support company, which added a contractor based in South Africa to our team.

We've been expanding our offerings as a Managed Service Provider (MSP). Recently, we adopted SuperOps as our Professional Services Automation (PSA) platform, having previously used Freshdesk for ticketing and a separate Remote Monitoring and Management (RMM) solution.

Q: How is Zinq IT doing now? What kinds of clients do you take care of, and what size are they in terms of revenue and customers?

Chris Pratt: We are expecting to reach \$1 million in turnover this year, which will be a big milestone. We've got 10 members of staff and a contractor in South Africa. I also run Zinq Cloud with two others—a specialized telephony and connectivity business that complements Zinq IT's managed services offering. We serve approximately 100 customers, and about half of them are on the managed services model. Our customer base spans various verticals, including manufacturing, engineering, electronics, textiles, estate agents, and accountancy firms. Most of our customers are SMEs, with team sizes ranging from five to a couple of hundred. We have clients in the UK, Europe, and America.

Q: When you look back at your journey so far, if you had to pick three reasons why you have grown to this stage, what would they be?

Chris Pratt: I think people, for sure. There's no way the business would have grown to this level without the right people on board. That's number one.

I have a business mentor—someone I've known for many years. He was the Managing Director of the IT company before I took it on, and he's still very much involved. He's helped me a lot, particularly in understanding the accounts side of the business, which has given me a good handle on the numbers. And then, I think it's sheer grit and determination to get things done.

Q: Looking back, if you had to change something, what would that be?

Chris Pratt: That's a difficult one. There have definitely been a couple of things. Recently, I tried to take part of the business in a different direction, and eventually realized it wasn't the right move. But had I not made that decision, I wouldn't have learned from it. Now, I'm really focused, and we know exactly where we want to take the business.

There have also been occasions where we spent a significant amount of money trying to improve internal systems and processes without fully evaluating the solutions beforehand. This has happened twice, where we invested a fair amount with little return. That's why, when we were considering the move to SuperOps, we went through a thorough evaluation phase. While the transition hasn't been entirely pain-free, we are absolutely getting value from it, and it was the right decision.

Q: So, what's next for you?

Chris Pratt: That's a good question. It's something I'm still figuring out. In the short term, until Q2 of this year, we're focusing on maximizing value from our existing customer base and improving internal processes to better serve them. This includes adapting some of our processes as the team grows and as we fully implement SuperOps. Hiring more staff will also be a priority.

In terms of revenue growth, I'm aiming for \$1.5 million this year. Over the next three years, the plan is to reach \$3 million in revenue. We're also planning to move offices within the next year and grow the team to 20 or 25 people. I

think defining clear goals is key so that everyone is aligned and pushing in the same direction. I'm confident we'll get there, and I'm excited for what's ahead.



Company	Customers	Specialization:
BizTechPro	110	Dermatology Practices



BizTechPro:

THE HYPER-NICHE MSP

George Ballane is owner of BizTechPro, an MSP (Managed Service Provider) located just outside of New York City. In this conversation, George shares his journey from a tech enthusiast to a business owner, discussing the evolution of his company from break-fix to a managed service provider, and finally, to a hyper-niche focus on dermatology practices. He also offers valuable insights into why being hyper-niche helps with business growth and his vision for the future of his company. Edited excerpts:

Q: Tell us about BizTechPro.

George Ballane: We are an MSP located about 45 minutes outside of New York City. Up until about a year ago, we were agnostic working with companies in any industry. But we decided to niche down and get into a really hyper niche. We like medical and healthcare, but we really focused on dermatology practices. Our goal is to help dermatologists spend more time with patients, improve their processes and help them grow their practices.

Q: What would you say helped you stay lean and grow?

George Ballane: I think you need a PSA and you need an RMM tool. I don't want to tell people to overspend and get every possible tool, but you need a foundation. Something like SuperOps, that is advanced is a good tool to have. I've evaluated a lot of them. The price (of SuperOps) is not a lot. Don't tell your finance department because they'll want to raise the prices on us. It literally runs my business. So you could track your customers, could track your quotes, you could track your tickets, you could track your projects. That keeps you efficient and helps you to continue to stay lean. So I would start with that. Don't go out and buy all the bells and whistles in the early days.

The SuperOps platform runs my business with automations and scripts that are running regularly. We actually identify recurring problems and fix them with scripting. That keeps us lean. This (SuperOps) and QuickBooks or Xero run my business. Compared to a year ago, our sales is up about 10% in gross sales, but our gross profit is up over 26%. Our sales are increasing, but our profitability went up significantly. So we're more profitable with just a little more sales, which to me is definitely a tribute to the systems we're using and the processes we're using.

Q: How did you become an MSP?

George Ballane: I was always a tech guy, I was always into electronics as a kid and found myself just really loving doing things with technology and computers. I decided to pursue a degree in computer science. I got a job right out of school. I ended up in the education space and was the director of technology at a private school. I always had a side hustle. I feel every technical person always has people they help and do things for. I was very fortunate that it afforded me the opportunity to have something on the side that I enjoyed as well. I branched out on my own in 2018 and became an MSP full time, because I had all those law firms and doctors' offices that I was helping anyway.

Q: When you started out, you had clients across industries. So how did you move from that to healthcare to dermatologists?

George Ballane: I feel you need to find a niche to grow. I'm working with a business coach consultant, Start Grow Manage. They believed in the niche concept. So, it took me a little bit to get to it. And then I started to say, I got to really analyze customers and analyze what I feel is good for me. And for other people, a different niche would be better. It really has to be what matches your goals, your values, your way of operating. So when I looked at the different industries, my criteria was, I want people with cashflow. And, dermatology has both where they're getting paid by insurance companies and they have a cash side of the business where they're doing cosmetic procedures. I also noticed that they were starting to rely more on the tech. So medical patient management systems, medical health records, electronic medical health record. A lot of these doctors offices now are using tech, right? And we wanted technology forward customers. They don't necessarily want to learn how it works. They just wanted it to be fully managed so they could see patients because that's what they're trained to do. So that aligned with me because I want to just make it work. Fast forward to now, the dermatologists are seeing that because the solution is managed and that the solution is smooth for them and it disappears into their process, it's changed their practices. I had one recently tell me, you changed our life.

Q: How big is your team now?

George Ballane: So right now it's myself and I have a help desk person that answers the phone. And then I have a couple subcontractors that are part of my team on a daily basis, but they're not full-time employees. I have a couple of them because we have all different areas that we're specialists in. But we have over 110 customers at this point. So we're operating very lean.

Q: What's the size of business right now and what next for you?

George Ballane: So our 110 customers - about 50% are phone service only customers (VoIP), and then the rest are managed service. But we still manage all of that through SuperOps. Tickets are coming in for VoIP. Even though we're not remoting in or running scripts on their systems, we're tracking everything through SuperOps. This year, we should hit \$1 million in gross sales, which I think for any small business is a huge milestone. My goal has been five million in five years just because it's a nice, easy way to say it. My coach consultant with Start Grow Manage (who everybody needs to check out. They literally change your business) thinks we could do \$5 million in 18 months, which I think is crazy. It's doable, but I think it's crazy. I would be very happy if we double the business and hit \$2 million. So short-term goal, I'd love to be at \$2 million by the end of 2025. And five years, \$5 million would be phenomenal for us.



SMALL TOWN,

BIG DREAMS

How Jacob Bespalec is laying the foundation to build a \$20-million rural MSP

In rural Nebraska, a middle-schooler wanting to make some money in the summer had one option - work on the farms to remove tassels from corn. Jacob Bespalec, CEO of Nebraska-based MSP Apt Interactive, who grew up in a town of just 2,200 people in Nebraska, however, had other ideas. Instead of working in cornfields, Jacob found his place in the world of IT.

QUICKChat

Taking a chance

A family friend had introduced Jacob to the world of IT, specifically the world of Apple Macintosh, and had become young Jacob's mentor. However, when the mentor moved away, Jacob found himself in a situation where he wanted to learn more about computers but didn't have anyone to turn to.

"I was left alone halfway into this journey of development and discovery and I wanted more. I needed to go find the resources and they were not very plentiful in rural Nebraska," reminisces Jacob. "At about that time my parents said I can't be sitting around the house all summer and need to go find something to do with myself."

Jacob knew trudging through cornfields in the humid summer of Nebraska was not for him. There happened to be a small computer store in town and young Jacob plucked up courage and asked the store owner if he needed help in the summer. Jacob worked at the store over two summers. The owner became his second mentor and generously shared his business knowledge with Jacob.

When Jacob was entering high school, his mentor retired. However, by then everyone in the town knew Jacob and he found himself fielding calls from townspeople seeking his help with their tech issues. "I tell everybody the phone hasn't stopped ringing

since. I still have clients to this day that I had when I was 15 years old. They still call me to help them with their printers and their computers," says Jacob, who is now 28, with a hint of pride.

Unsurprisingly, Jacob opted to pursue a computer engineering major in the University of Nebraska. "I thought I wanted to go build software and had some great ideas about how I could really change rural Nebraska through software," he explains.

However, reality hit hard when he failed his first programming class. "Very quickly, I realized that was not a career I was actually that interested in. I was interested in the image of being a software developer, but not in the work itself." After a brief stint as a math major, he found his true calling in the College of Business, graduating with a marketing degree.

The birth of Apt Interactive

There was another positive outcome of attending the University - Jacob's roommate, Brian, who continued Computer Engineering, went on to be CTO of Apt Interactive. There was another good outcome of

having studied in the University. During his college years, Jacob and his roommate, Brian, an aspiring computer engineer, launched a venture that encompassed a wide range of services, including computer building, website design, tech support for a local company, and even wedding videography. "We did just a bit of everything in those days, trying to figure out what we really wanted to do with ourselves for the long term." The turning point came when someone introduced them to the

concept of MSPs. The idea of recurring revenue and serving small and medium-sized businesses (SMBs) resonated with them. With limited experience and no certifications, they took the plunge, starting Apt Interactive and offering basic help desk support and antivirus protection for a quarterly fee. Their early clientele was as diverse as the businesses that dot the landscape of rural Nebraska - healthcare providers, machine shops, hardware stores, hospitality businesses, and professional

services firms. "Really, when you just visit a small town, every type of business, accountants and lawyers, that you see represented in Main Street America, we probably had somebody in that vertical that we were taking care of," Jacob explains.

Initially, Apt Interactive operated out of a makeshift workspace split between Jacob's parents' basement and his college dorm room. "Nobody was super thrilled with that arrangement. We were very quickly out of space and monopolizing other people's," Jacob recalls with a chuckle. The solution came in the form of Jacob's grandfather, who had retired and owned a building in downtown Crete. "It seemed just like a perfect match. And so we asked my grandpa if we could rent the front of the building from him for a little while," Jacob says. The space proved ideal, and they eventually bought the building from him, investing in a complete exterior renovation.

Navigating the pandemic and embracing remote work

The COVID-19 pandemic brought its share of challenges, particularly supply chain disruptions that hampered revenue growth. However, it also pushed Apt Interactive to enhance its expertise in

remote technology. "While, you know, being in rural Nebraska, most of our clients had not sent their staff home, a lot were considered essential businesses. But a lot of our customers were forced to then interact with their vendors and their colleagues that were working remote and hybrid," Jacob explains. This forced adaptation proved beneficial, equipping them with the skills and experience to support clients in a rapidly changing world.

From two-man band to scalable operation

For the first seven years, Apt Interactive was essentially a two-man operation, with Jacob and Brian handling everything. "We were the field technicians... one of us was touching every single ticket and talking to all of the customers," Jacob recalls. This hands-on approach, while effective in the early stages, became unsustainable as the client base grew. "We had realized that we had kind of gotten ourselves into an unsustainable business model where our customers would call us, we'd pick up the phone and they would expect, you know, their issue to be fixed immediately right then," he says.



QUICK Chat

The need for a more scalable model coincided with Brian's decision to pursue a career in software development.

Faced with this dual challenge, Jacob began exploring outsourcing options. After extensive research and consultations with other MSPs, he decided to partner with Benchmark 365, an outsourced help desk company. This strategic partnership, which Jacob describes as "one of the best decisions we have ever made," provided Apt Interactive with a dedicated pod of 15 skilled professionals, effectively expanding their team overnight.

Ambitious goals

Apt is targeting to cross \$750,000 in 2025. Jacob is looking to hire engineers who can take on more specialized work that does not fall in the services scope of Benchmark.

With a solid foundation in place, Jacob has set his sights on ambitious growth targets. His goal is to build Apt into a \$20 million MSP, a target inspired by the success stories of other entrepreneurs in the industry.

To achieve this, he plans to leverage strategic acquisitions, focusing on small, independently



owned MSPs across the US. When his CTO broached the subject of exiting the business, Jacob had considered being acquired. While that was a short lived exploration, Jacob did consider such points as how will his customers be taken care of in case of an acquisition.

Now that he is on the other side of the table, Jacob is keeping these points in mind when assessing businesses to acquire.

"We want to go out and find all of the sub \$1 million, one, two-man MSPs that are exactly in the shoes that we were and empower them with greater set of tools, greater set of resources, so either they can just keep working the way they have until they're ready to retire or you really bring them into Apt Interactive in a way that is sustainable for them," Jacob explains. He sees this as a win-win scenario, allowing him to expand his reach while providing smaller MSPs with access to resources and support.

Lessons learned

Reflecting on his journey, Jacob acknowledges that there are things he would have done differently. He wishes he had been more diligent about collections and billing early on. "I would have loved to be more serious about collections and billings with our clients. I would have loved to better understand that the market that we find ourselves in, everybody's not a customer," he admits. He

QUICK *Chat*

also emphasizes the importance of finding clients who align with Apt's values and approach to customer service. "Everybody isn't and everybody shouldn't be our customer," he states firmly.

Jacob has audacious goals, and he has spent the last few years laying out his path to growth. Apart from the solid planning he has done, Jacob has another reason to feel optimistic.

"I think there has never been a time like now where you can build an MSP as efficiently and well run with the best tools available in the industry, the best people available in the industry," says Jacob. "You couldn't build something the way that we have it set up just a few years ago. SuperOps didn't exist on the market then; Benchmark is a new entrant as well. I think a lot of people are taking outsourcing and offshoring a lot more seriously, and I hope everybody does. It's allowed for tremendous growth for us in a much more sustainable way. So I think that with those resources at our fingertips, we can reach that \$20 million mark."



"There has never been a time like now where you can build an MSP as efficiently and well run with the best tools available in the industry, the best people available in the industry."

Optimistic.

**JACOB
BESPALEC,**
CEO, Apt Interactive

The

CONVERSATION

MSPs and marketplaces:

A NEW ERA



The digital landscape is rapidly evolving, transforming how Managed Service Providers (MSPs) operate. Online marketplaces have become a powerful force, presenting both challenges and significant opportunities. A recent study by Channelnomics and Pax8, sponsored by SuperOps, titled "The Digital Sales Evolution: How Solution Providers are Harnessing the Power of Marketplaces for Growth," explored this dynamic shift. Ryan Walsh, Co-founder and Chief Strategy Officer at Pax8, and Juan Fernandez, Global Channel Chief at SuperOps, shared their insights with the SuperOps team on how marketplaces are reshaping the MSP landscape.



Understanding the marketplace landscape

Marketplaces have evolved from simple online storefronts to sophisticated platforms offering a wide range of solutions and services. MSPs must understand this evolution to leverage marketplaces effectively. Ryan noted that Pax8 recognized a few years ago that many MSPs lacked a clear understanding of the full potential of software marketplaces, which prompted the study.

Key challenges for MSPs in the marketplace era

While the benefits of marketplaces are becoming increasingly clear, MSPs still face several challenges. One key challenge is the misconception that marketplaces are a competitive threat. Some MSPs worry that customers who use marketplaces prefer self-service and therefore won't partner with an MSP. This overlooks the significant need for personalized support and expertise, even when purchasing through a marketplace.

Another challenge is operational adjustments. Effectively leveraging marketplaces requires MSPs to adapt their operational strategies to focus on customer needs. This includes deeply understanding their target customer segment, industry, and specific requirements. Juan emphasized the importance of "understanding the needs of the customer, the customer segment, and the business type."

Friction in selling presents a further hurdle. Traditional sales process-

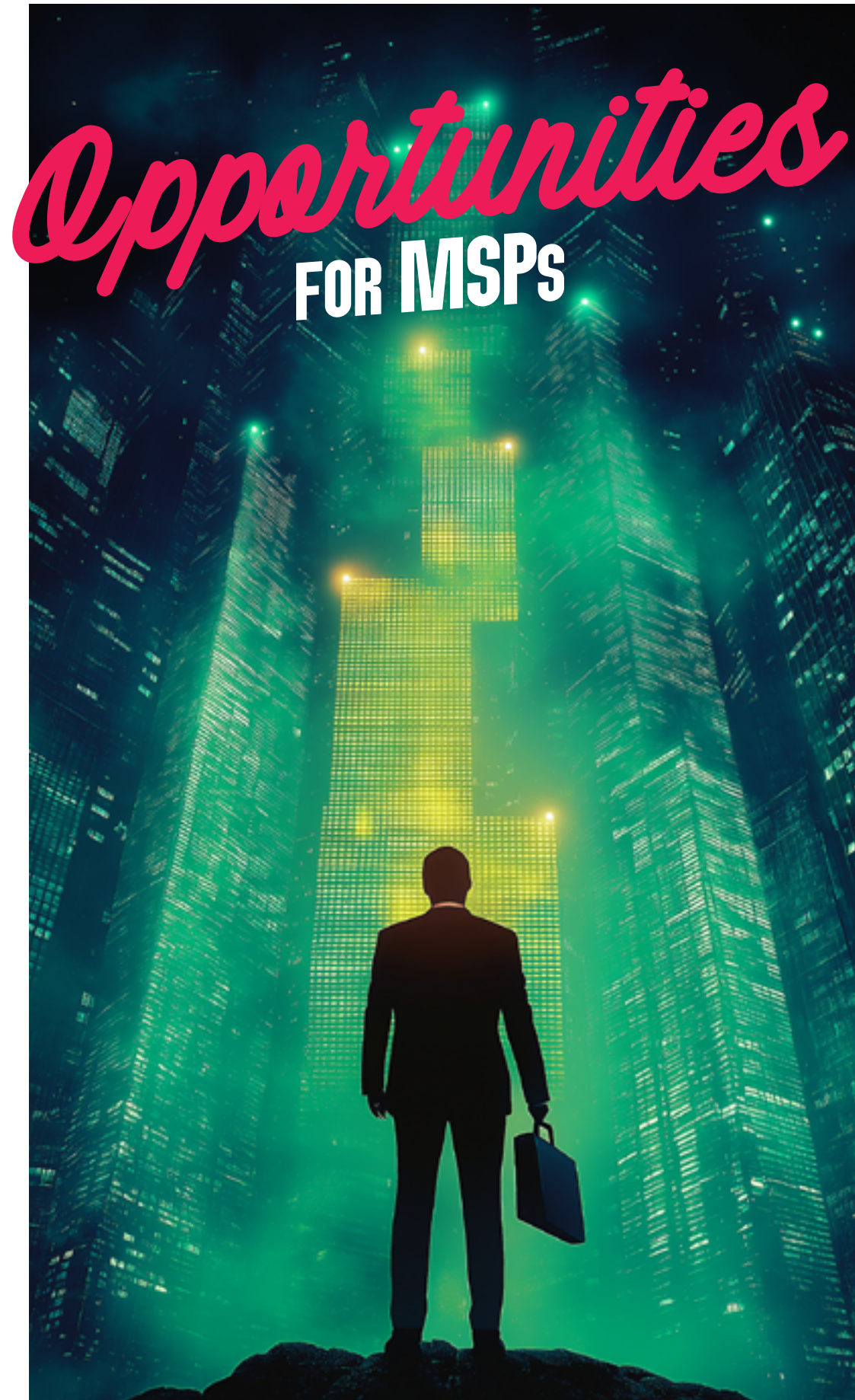
es, often involving manual paperwork and lengthy interactions, can create friction for customers accustomed to seamless online experiences. Juan likened this to "transferring paper and how we took payments many years ago," advocating for a modern, digital experience where customers can "just click buy."

Opportunities for MSPs

Despite these challenges, marketplaces offer numerous opportunities for MSPs to grow their business and better serve their customers. Enhanced profitability is a key benefit. Marketplaces enable MSPs to more efficiently identify product gaps, expand their customer base, and operate online, transcending geographical limitations. Ryan pointed out that with online marketplaces, "no longer are you tethered to a physical location," significantly expanding growth potential.

Marketplaces also increase the sales of professional and managed services. Customers often need assistance with delivery, configuration, setup, and optimization. As Ryan explained, "Once you are being exposed to a product, you still may need help and you do need help as a small business... you are gonna need a partner to help you deliver it, configure it, set it up, optimize it."

Access to a modern customer experience is another key advantage. Customers expect convenience and ease of use, which marketplaces deliver through self-service options. Ryan emphasized that customers are demanding a "modern experience" and are used to



Opportunities FOR MSPs

"that ease of experience."

Marketplaces also enable competitive differentiation. MSPs can offer unique, personalized experiences tailored to specific customer needs, moving beyond a one-size-fits-all approach. Juan highlighted that "cheap doesn't rule the day, differentiation does," adding that "customers have that expectation" of highly personalized experiences.

Top-line growth is driven by improved customer acquisition, increased consumption of "as-a-service" solutions, and enhanced profitability. Marketplaces also foster new partnerships and expose MSPs to vendor products that can benefit their business and meet customer demands. Juan noted, "When you have marketplaces and powerful platforms like SuperOps come together, you really get to amplify the opportunity for partners at the end because they sit in the middle of our ecosystem as the hero."

Efficiency and automation are enhanced through marketplaces. APIs enable instant provisioning and streamline consumption-based billing. Ryan emphasized the importance of integration, stating that the "API layer allows us to provision that bundle quickly, instantly," and "allows us to tame the complexity of a bill that's based on consumption."

Finally, marketplaces level the playing field, empowering smaller MSPs to compete with larger players by enabling them to be

more agile and deliver outcomes faster. Juan advised, "(MSPs should) Use your disadvantage as your advantage because so many of the larger players are actually going to be slower to turn the ship to move back toward this new North Star."

Strategic considerations for MSPs

To effectively navigate the marketplace landscape, MSPs should consider several strategic factors. Embracing uniqueness and brand identity is crucial. MSPs should leverage marketplaces to showcase their unique service offerings and brand. Harnessing the power of data is also essential. MSPs should use data analytics to gain insights into customer behavior, identify product gaps, and tailor their offerings.

Seeking partnerships and collaboration is vital. MSPs should actively seek partnerships to expand their reach and enhance their capabilities. Juan advised, "Do not go it alone. Find a peer, find somebody to work alongside of." Focusing on customer outcomes is paramount. MSPs should prioritize delivering tangible results, aligning their offerings with specific business goals. Juan emphasized "outcome-based delivery," where MSPs demonstrate how their solutions "are going to improve your business and bottom line."

Finally, embracing agility and adaptability is crucial. In the rapidly evolving marketplace, MSPs must be agile and continuously learn and adjust their strategies.

THE FUTURE OF MARKETPLACES:

AN AGENTIC AI WORLD



The future of marketplaces is intertwined with the rise of agentic AI, which promises to transform how MSPs operate. "Agents in so many ways are going to be doing the work with us so that we can create single-person unicorns," said Ryan.

To prepare for this future, MSPs should embrace AI and automation, actively exploring and implementing AI-powered tools to streamline operations and enhance efficiency. Visualizing data for faster decision-making is also key. MSPs should leverage data visualization tools to gain insights and make informed decisions. Finally, acting now and embracing change is essential. MSPs should not wait to adopt new technologies but rather experiment with innovative solutions.

The digital sales revolution is reshaping the MSP landscape, with marketplaces at the forefront. While challenges exist, the opportunities for MSPs are immense. By leveraging uniqueness, harnessing data, seeking partnerships, focusing on outcomes, and maintaining agility, MSPs can navigate the marketplace successfully and thrive in the agentic AI world. As Juan concluded, MSPs should "think smart," "understand the problem you're solving," "focus your business on an outcome," and "make sure that you have a wonderful life while you're doing it."

EMBRACING THE DIGITAL SALES EVOLUTION: HOW MARKETPLACES ARE TRANSFORMING THE CHANNEL

The Channelnomics report, *Digital Sales Evolution in the Channel - How partners are embracing marketplaces to extend sales capacity and opportunities*, examines the evolving landscape of technology sales, specifically focusing on the rise of marketplaces and their impact on solution providers. Conducted by Channelnomics, and sponsored by unified PSA-RMM solution provider SuperOps and technology marketplace major Pax8, the report examines the evolving landscape of technology sales, specifically focusing on the rise of marketplaces and their impact on solution providers. The report is based on a survey of over 400 solution providers globally.

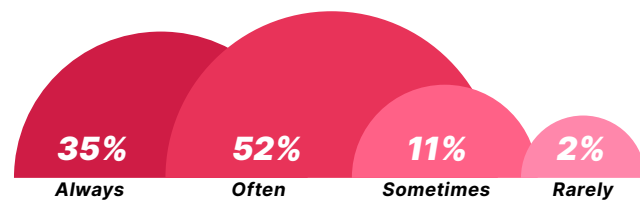


The rise of marketplaces

The shift towards marketplaces is driven by a fundamental change in customer behavior. Just as Amazon revolutionized retail with its easy-to-use platform, B2B buyers now expect the same convenience and transparency in their technology purchases.

The report shows that a majority of solution providers frequently source products through marketplaces.

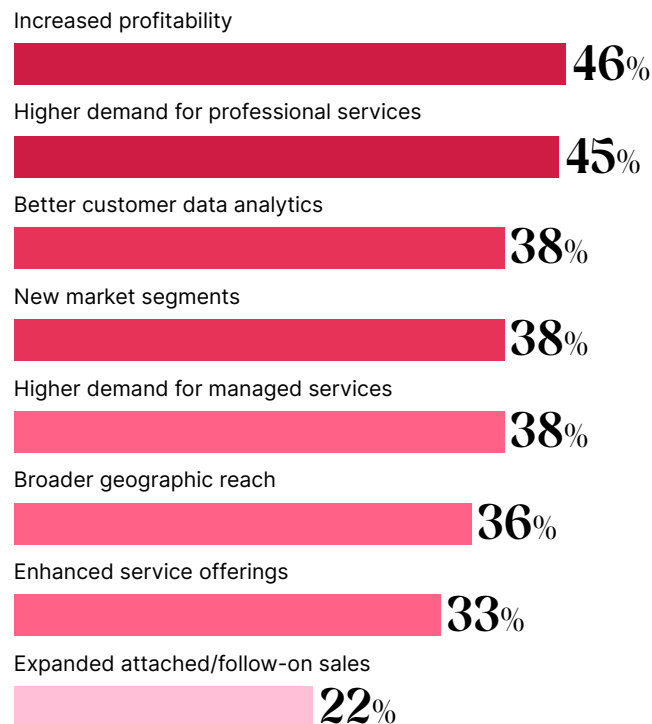
Frequency of solution providers sourcing products through marketplaces



Marketplaces unlock new opportunities

The report highlights that 9 out of 10 partners worldwide recognize the potential of digital sales and marketplaces, seeing them as avenues for growth and

Opportunities created by marketplaces and digital sales platforms



Digital sales: The new norm

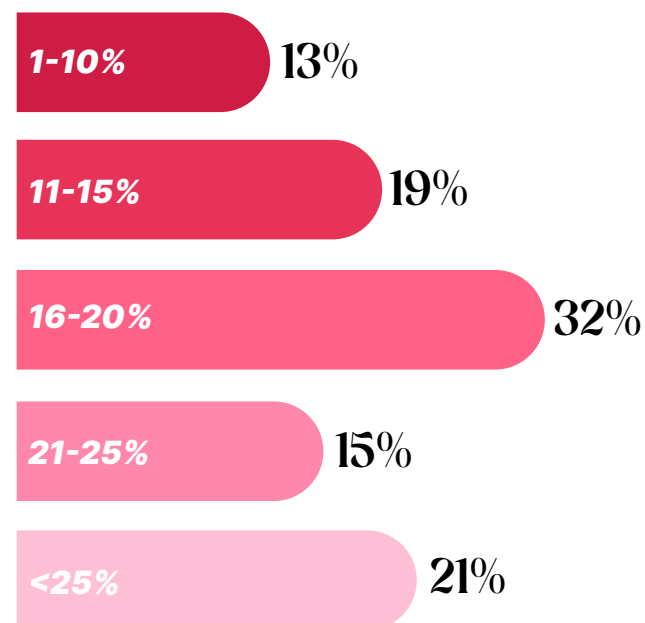
The report finds that digital sales are already a significant revenue stream for many solution providers and the report shows that 36% of solution providers globally generate over 20% of their revenue from digital and marketplace sales. Not just that, the average solution provider is generating 16% to 20% of its gross revenue through the sale of products through marketplaces or products sourced from marketplaces on behalf of its customers.

Percentage generating more than 20% from digital sales



36% of solution providers worldwide generate more than 20% of their revenue from digital and marketplace sales.

Percentage of solution providers' gross revenue from digital sales



Adapting to the changing landscape

Solution providers are actively adapting their go-to-market strategies and operations to capitalize on the digital sales evolution. The report demonstrates the strong expectation of increased marketplace utilization in the coming years.

Customer feedback plays a crucial role in shaping these strategies. A significant majority of solution providers, particularly in North America, consider customer feedback about marketplace experiences when making business decisions.

Operational changes for marketplace success

Solution providers are implementing various operational adjustments to align with the demands of digital sales, as illustrated in the chart below.

How partners have incorporated marketplaces into GTM models



Considerations for developing a digital sales strategy

The report outlines key considerations for solution providers building a successful marketplace and digital sales practice. These factors include:

Brand reputation:

Building and maintaining a strong brand is essential for attracting customers and establishing trust in the digital marketplace.

Cost-effectiveness:

Carefully evaluating marketplace costs, including fees, commissions, and marketing expenses is crucial for profitability.

Technological compatibility:

Ensuring seamless integration with existing systems and processes is vital for efficient operations.

Customer demand:

Continuously assessing and adapting to customer needs and preferences in the digital landscape is critical.

The digital sales evolution, driven by the rise of marketplaces, presents both challenges and significant opportunities for solution providers. Embracing this transformation requires strategic adaptation, operational adjustments, and a customer-centric approach. By aligning with customer preferences, leveraging the advantages of marketplaces, and continuously innovating, solution providers can secure their position in this dynamic and rapidly growing sector.

Me TAKE

EXPERT COLUMN

Building a
solid foundation:

THE ABCs OF MSP MARKETING

MARK *Copeman*



I know, we all love the tech side of things, but to really grow your business, you have to get out there and start those conversations. I've been doing this for a while now, working with msp's around the world, and let me tell you: getting those foundations right is absolutely key.

Get your mindset right

Now, I realize a lot of MSP owners would much rather be tinkering with servers than thinking about marketing. But here's the thing: "Nothing happens without sales," as Mr. Ford said. You can have the most amazing tech stack in the world, but if you don't have customers, well, you've got nothing.

So, let's reframe the whole idea of lead generation. Instead of "leads," let's look at it as "starting conversations". Feels a bit less intimidating that way, doesn't it?

KNOW YOUR TARGET MARKET

WHERE'S YOUR PLAYGROUND?

Think about it like this: you wouldn't go fishing in the desert, would you? The same goes for marketing. You need to know exactly who you're trying to reach and where they hang out. It's about being realistic about your target market. Don't try to be everything to everyone – find a niche, focus on it, become an expert in that space. It makes everything so much easier, trust me.

PLAY THE LONG GAME



Structure your offer: the product ecosystem

Let me introduce you to a game-changer: the product ecosystem. This framework, which I learned from the brilliant Daniel Priestley, can help you structure your proposition and guide prospects through their buyer journey.

Free gift:

This is your chance to show off your expertise, start building that trust, and get the conversation going. Offer something valuable for free, like a website review, a security assessment – maybe a scan of their Microsoft 365 tenant to uncover any vulnerabilities. Or even an on-site consultation – people love a good face-to-face meeting. Remember, in our world, it's all about people buying from people.

Product for prospects:

Now it's time to take things to the next level, get a commercial relationship going. This is your stepping-stone product, a tangible project with a fixed price – something that delivers real value and shows them what you're capable of.

Core product:

This is your main attraction, your flagship managed services package, the MRR. And here's a tip: consider a standardized core offer – it simplifies delivery and provides a clear starting point.

Product for customers:

Don't forget about those who are already on board. Your existing clients are a fantastic source

of potential growth. Regularly check in with them, see how you can provide even more value, maybe offer a new service or an enhancement to their existing package. Make sure they know about everything you offer! You might be surprised by how much more you can help them.

Play the long game

Let's be real: marketing is a marathon, not a sprint. You can't just do a bit of social media here and there and expect miracles. It's about playing the long game. I like to think of it as my version of PPC – not pay-per-click, but patience, persistence, and consistency. Remember Newton's third law: action, reaction! Keep taking those steps, and things will start to happen.

Don't neglect your website

Your website is your digital storefront – it's the first impression many prospects will have of you. Make sure it's doing its job. Invest in getting the message right, making it easy to navigate, and showcasing what makes you unique. A well-designed website can be a lead-generating machine.

Final thoughts

At the end of the day, the MSP business is all about building those human connections. It's about earning trust, delivering fantastic service, and building those long-term relationships. Get out there, start those conversations, and watch your business thrive.



GET OUT THERE!

MARK COPEMAN

*The MSP marketing expert is a Director at Wingman MSP Marketing, an agency dedicated to starting conversations with prospects for IT support businesses (MSPs) around the world. A serial entrepreneur, Mark is also the author of the books, *MSP Secrets Revealed* and *Helpdesk Habits*. He is also the creator of the online customer service video program, helpdeskhabits.com and the MSP M&A Blueprint programme, mspmanda.com.*

EXPERT COLUMN

Financial management for MSPs:

FROM BOOKKEEPING TO BUSINESS MASTERY

HEATHER MACDONALD *Alford*



As a Managed Service Provider (MSP), your journey from entrepreneur to business owner is marked by numerous challenges. One of the most crucial aspects of this transition is mastering your company's financial management.

Let's face it, there is nothing sexy about compliance and following a bunch of rules. Unlike marketing and sales, accounting does not produce quick wins or give those dopamine hits we love so much. That is exactly why it often ends up at the bottom of the to-do list.

Anything finance-related requires a different kind of energy. It needs you to take your time to understand it, but remember, when you do, the rewards are great.

EXPERT COLUMN

A familiar lens

Let's start by looking at this through a more familiar lens. If a customer comes to you asking for a basic Microsoft 365 license, no backup, and the bare minimum support, you know this path is going to slow them down and cost them money.

The same goes for your finances. If you value the success of your business, you won't cut corners that could cost you later.

Let's take a look at what you should be doing, who should be doing it, and when to delegate to someone else.

In the beginning: there was you

Accurate bookkeeping is the foundation of financial success for any business, and MSPs are no exception. It provides a clear picture of your financial health, helps in decision-making, and ensures compliance with tax regulations. For MSPs, where recurring revenue models and varied service offerings are common, maintaining detailed and organised financial records is particularly crucial.

When you're starting out, you can easily do your own bookkeeping if you have the time and desire. I encourage you to get familiar with the basics and form good habits. Here are a few tips to help you get started:

1. Choose accounting software that will work with you as you grow.
2. Set up a Chart of Accounts that keeps M&A in mind:
 - * Recognizing Recurring and Non-Recurring income and expenditure.
 - * Allows for income and expenditure to be recorded as annual, quarterly, or monthly.
3. Ensure there is proof of purchase for every expense with the right supporting documentation, especially if you are reclaiming UK VAT or equivalent in another country.
4. Do not buy personal items through your business. Take a salary and avoid unnecessary impact on your Director's Loan account.
5. Check your actual bank account balances match those in your accounting software each month. While the bank may have an auto-feed, this crucial step should be completed monthly to ensure there has been no transaction drop-off or duplication in automation.
6. Keep up to date with your bookkeeping – it gets messy quickly.

If you prefer to get someone else to do your bookkeeping from the beginning, find someone who comes highly recommended, has relevant qualifications such as

EMPOWER YOURSELF



EXPERT COLUMN

AAT Level 3 and above, and has relevant experience. If they are outsourced support, do not forget to ask to see their license and insurance.

Now that you have got to grips with the basics, it is time to level up.

Let's get down to business

We are all familiar with the saying "what you put in, you get out."

Regularly reviewing financial statements and key performance indicators (KPIs) is crucial for making informed decisions. But these should only be extracted if the quality of the data has been maintained to a high standard.

A good Management Accounts pack will be presented in a way you can understand, with specific reports such as:

- ↳ A Comparative Profit & Loss detailing how your actual business is performing against budget and prior periods.
- ↳ A Balance Sheet showing the financial health of the business at any given time.
- ↳ KPIs such as Gross Profit Margin, Net Profit Margin, Budget Variance, and EBITDA.
- ↳ Aged Debtors
- ↳ Aged Creditors

These reports will help you identify issues within your business before they become problems. Some things my team and I come across regularly are:

Under-pricing services:

Until an MSP sees their Profit and Loss, they're working on the basis of what they think rather than what they know. With clear visibility of costs, the pricing model can be checked to ensure desired profit margins are reached. Don't undervalue your expertise.

Failing to plan for taxes:

When the final Profit and Loss is confirmed, this gives you the opportunity to set aside funds for VAT and Corporation Taxes and consider their impact on cash flow.

Missing revenue:

Customers not being invoiced for all the services they are taking from the MSP, especially if they have updated or added services after the original contract is agreed.

While you can review your own Management Accounts, I personally don't recommend it. This is where the guidance of an expert is really helpful. Using their experience, they will be able to check your source data and identify things for you to look out for.

Remember, as eager as you may be to look at that Profit and Loss, you must ensure you avoid the unnecessary consequences of not joining all the dots.

Conclusion

If you get this stuff right, your journey will be far less painful, and you will face fewer challenges because you're leading your business, not being led by it. Mastering financial management is not just about compliance; it's about empowering yourself with the knowledge to make informed decisions and drive your MSP towards sustainable growth and success.



LEVEL Up

HEATHER MACDONALD ALFORD

Is a leading finance expert to MSPs. With an exceptional eye for detail and unwavering integrity, Heather has earned a reputation for delivering trustworthy precise financial insights. As a proud Scot with a keen sense of humor, she infuses warmth and wit into the world of MSP finance. Diagnosed with ADHD, Heather is a strong advocate for neurodiversity in the workplace.

BANTER

MSP PET PEEVES

From dodging vendor pitches to rescuing files fallen into disastrous abysses, MSPs navigate a landscape filled with annoyances. We have compiled some of the most common pet peeves MSPs have, that make you all internally scream, "no, not this again".

Dealing with vendors like wedding planners on caffeine

Everyone wants to make a 15-minute pitch to you claiming to solve a problem you don't have yet. A tool that claims to find a needle you are not interested in, in a haystack you don't have - sounds familiar? Now imagine this pitch happens while you are racing against time to fix a problem your most valuable client has raised?

Working with clients who ask for solutions but treat IT advice like an unsolicited diet plan.

They want results without changing their habits or working for it.

Spending more time cleaning doughnut crumbs out of laser printers than fixing actual IT issues.

Let's...say no more.

Clients clicking on links they really, really shouldn't be clicking.

You went over these at your last five security awareness meetings. But, to no avail!

Hiring feels like organizing a company picnic with a revolving door.

Honestly. You feel like you started this company to fill open positions, not to actually run the company. The turnover situation is in...sane!

Two words. Legacy software.

Tons of features you'll never use, data that's spread across multiple tools that seem to baulk at the prospect of "talking" to each other, plus any useful addition making the platform collapse from the inside — where's the silver lining, really?

Repeating the same answer to the same question from five different people

You don't have a problem with giving clarity or making the solution understood. But the same thing over and over? Makes even the most patient MSP want to resort to automated responses!

(Technician special mention) *Wow shiny gadget* — *Drops \$5,000 on shiny gadget* — "Make shiny gadget work."

Meanwhile, the request to add one more user to that really useful tool was rejected. It's 50 bucks.

Proposal with proactive risk management with potential risks, steps, and solutions - *rejects*.

*Comes back with the same risks, asks for solutions, gets the same solutions - *accepts*.*

Did we miss any? Write to us at mSPbugle@superops.com.

(Team SuperOps)

THE BACK *Story*

COMMUNITY *Scoop*

FRESH UPDATES, HOT OFF THE PRESS!

Welcome back to the SuperOps Community Scoop, where there's always something new brewing! Grab your coffee (or tea, we don't judge) and check out what's been happening lately.

A wellness space just for MSPs (+ a Betterhelp discount!)

Running an MSP is no small feat, and burnout is real. That's why we've launched a Wellness Space in the community—a place to unwind, recharge, and find support. If you're thinking about talking to a professional, we've got you covered! We've teamed up with BetterHelp, so you can get 30% off your first therapy session.

MSP book club is here!

For those who love a good read, we've started an MSP Book Club! Whether it's leadership insights, business strategy, or an inspiring success story, this is the perfect place to discover and discuss books that help you grow.

Catch up on webinars anytime

If you missed any of our recent sessions, don't worry—all community webinars are now available on-demand. A standout this month was Nate Freedman's three-part series on inbound and outbound marketing for MSPs—packed with actionable insights to help you grow your business.

SuperPod: new episodes are live!

Need something to listen to while working? The latest SuperPod episodes are now available! Tune in for industry insights, expert advice, and stories from fellow MSPs—all in bite-sized, easy-to-digest episodes.

MSP LiftOff: a boost for startups

If you're just starting your MSP journey, we've got something special for you. The MSP Liftoff program gives new MSPs a 40% discount on SuperOps, plus access to a founders-only group where you can swap ideas, ask questions, and get the resources you need to grow.

A community for women MSP founders

Leading an MSP as a woman? We've got a space just for you! Our Women MSP Founders Group is all about support, connection, and helping each other scale.

That's a wrap for this edition of Community Scoop! There's always something happening in the SuperOps Community, so come say hi, join a discussion, or just lurk until you're ready. We're here for it!

The SuperOps Community – for MSPs who want to be in the know, always



Book MARK

Managed Services in a month By Karl W. Palachuk

Building a successful MSP business is not an overnight process, but Karl Palachuk's *Managed Services in a Month* offers a step-by-step roadmap that makes the journey a little easier. Targeted at MSPs looking to streamline their operations and create predictable income, this book walks you through a 30-day process to set up a managed services model, from defining service offerings to structuring client agreements and ensuring solid support systems.

Karl shares practical tips and checklists, helping you put processes in place for efficient service delivery, pricing, and contract management. Whether you're just starting out or looking to upgrade your MSP, this book provides a solid foundation that will help you increase profitability and build lasting client relationships.



Art of managed services By Charles Weaver

Running an MSP takes more than just technical expertise, and Charles Weaver's *Art of Managed Services* walks you through the business side of things. This book offers valuable insights into the operational and relational skills required to successfully run an MSP.

Drawing from his years of experience in the industry, Charles covers key areas such as client management, service delivery, and scalable operations—for new as well as established MSPs. Combining practical tips with strategic guidance, this book serves as a mentor's guide for MSPs looking to deepen their understanding of the business side of managed services.



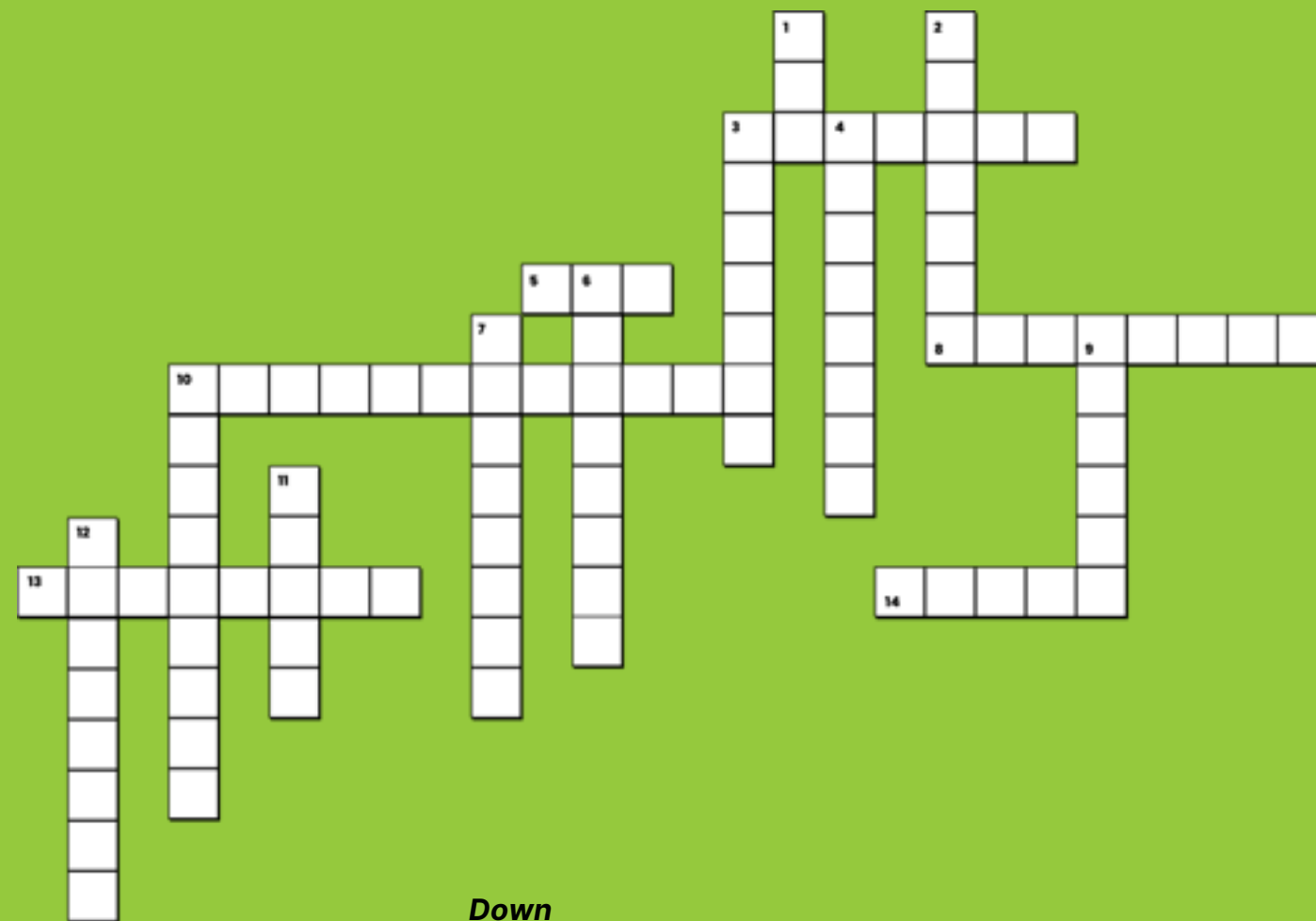
Package, price, profit: the essential guide to packaging and pricing your msp plans By Nigel Moore

While the technical aspects of running an MSP are demanding, packaging and pricing your services can be equally challenging, since you have to balance both profitability and customer satisfaction.

Nigel Moore's *Package, Price, Profit* comes to the rescue, simplifying the process with real-world strategies. Nigel provides guidance on how MSPs can choose which services to include, effectively package their services, and price them strategically. Coming with years of industry experience, Nigel's advice helps MSPs build sustainable pricing models and optimize their offerings while keeping the client's needs in mind.



CROSSWORD PUZZLE



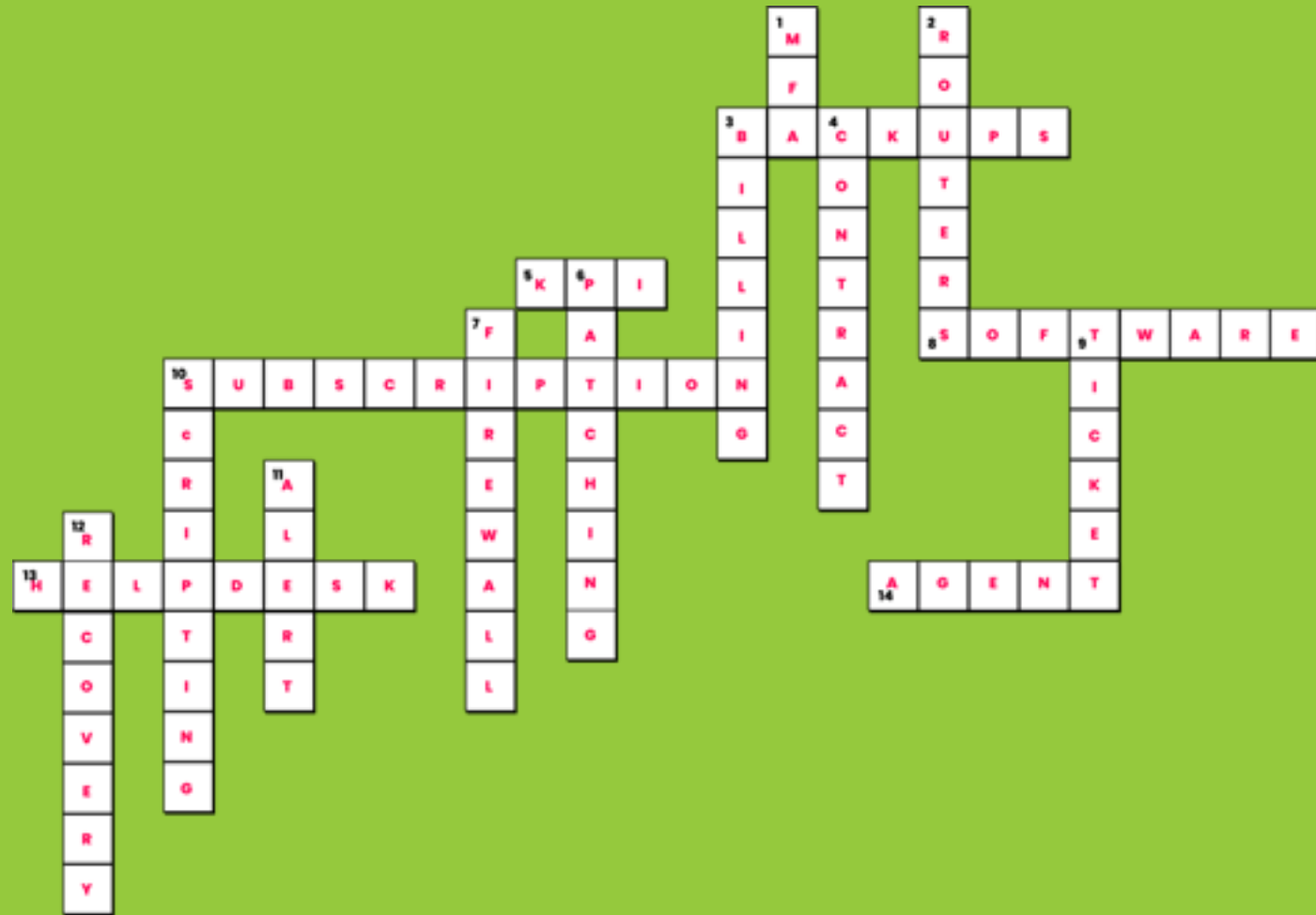
Down

1. Because one key isn't enough for this digital lock (03)
2. The network's nervous system (07)
3. Where revenue begins (07)
4. The client's digital handshake (08)
6. Plugging security holes (08)
7. Shield against cyber storms (08)
9. The heart of IT support (06)
10. Automation's best friend (09)
11. RMM's core function (05)
12. The plan for when chaos reigns (08)

Across

3. Keeps client data safe (07)
5. Metrics that matter most (03)
8. The technician's digital toolkit (05)
10. The lifeblood of recurring revenue (12)
13. Where tickets meet their fate (08)
14. Silent partner in proactive IT (05)

ANSWERS



Answers:

Down:

1. MFA
2. Routers
3. Billing
4. Contract
6. Patching
7. Firewall
9. Ticket
10. Scripting
11. Alert
12. Recovery

Answers:

Across:

3. Backups
5. KPI
8. Software
10. Subscription
13. Helpdesk
14. Agent

UP NEXT

Snapshot of upcoming events for the networking-MSP

March Channel Live

19th-20th 2025
Birmingham, UK

March Channel Partners Conference & Expo

24th-27th 2025
Las Vegas, USA

March SDI Spark 2025

27th 2025
Birmingham, UK

April TECHSPO Toronto 2025

16th-17th 2025
Toronto, Canada

April ChannelNEXT

28th-29th 2025
Saint Sauveur, Quebec

May Women of the Channel

13th-14th 2025
Huntington Beach, USA

May Dublin Tech Summit

28th-29th 2025
Dublin, USA



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