

The 2024

IT SERVICES BUYER'S GUIDE

for Financial Planning
Firms



COMPEX IT

Supporting people first

The 2024

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for Financial Planning Firms

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CHAPTER 1

The 5 big technology revolutions affecting firms like yours



Hello, my name's **Mark Dodds**, and I'm the owner of **Compex IT**.

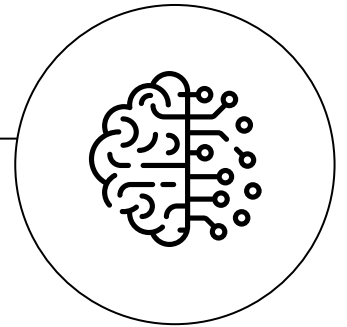


Wow... what a crazy few years it's been for business owners and managers like you and me.

Whether you're doing well today or having to fight for every bit of business you can get, you can't have missed the dramatic changes in the technology we all rely on.

I believe we're in the middle of a series of massive and interrelated technological revolutions. **There are 5 areas in particular that I see are directly affecting the clients my team and I look after:**

Revolution: AI

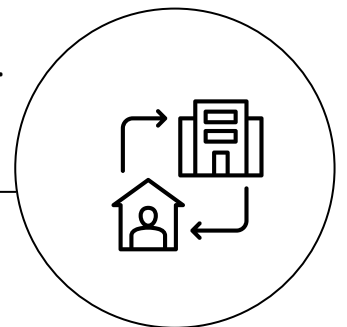


Go back a couple of years to 29th November 2022 and to most people, AI was a science fiction concept... something that would happen "in the future". Then the next day ChatGPT was released to the public, and the AI explosion started.

AI tools have been in development for many years, but it's only been recently that many people have become aware of them – and have been able to directly access them through their browsers. You've experimented with ChatGPT, Google's Bard, or Microsoft's Copilot, right? Even if you haven't, your business is already benefitting from AI built into the tools you use every day.

It's been such an exciting start to this revolution... and who knows what insane developments are on the way for financial planning firms.

Revolution: Hybrid working

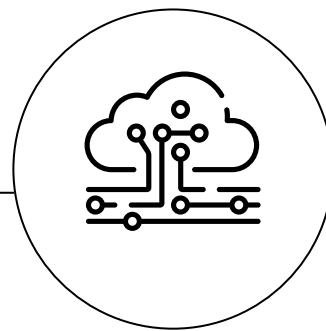


The first lockdown back in 2020 accelerated something that was already gaining huge traction: People want the option to work from home or the office. Or Starbucks.

Technology now makes it so easy to work from anywhere. You just need to be very aware of the security implications, and make sure your people can communicate well and be fully productive wherever they choose to work.

The tools for this are developing at an astonishing rate, and it's always worth reviewing how your business communicates and collaborates.

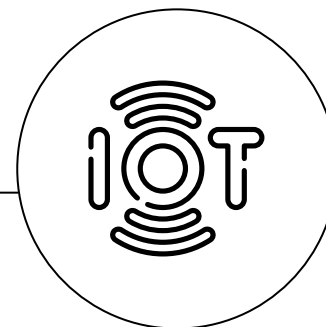
Revolution: Cloud computing



The idea of being able to work anywhere, any time, on any device, is so easy because of the cloud. Can you remember the bad old days when you couldn't access data unless you were in the office? Unthinkable now.

But as the data has been freed, so we must take greater care of it. The cloud liberates us and also puts us at a dramatically increased risk of crime. More on that in a second.

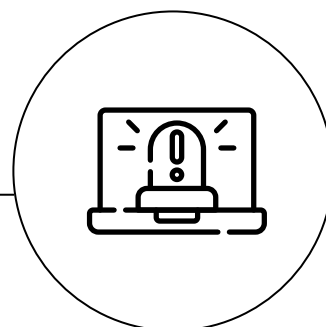
Revolution: Internet of Things



The day your fridge was allowed to go online was surely the day you realised eventually EVERYTHING will be online. Experts predict there'll be 30 billion devices online by 2030.

Great for helping us check how many eggs we have left while we're at the shops, but there are huge security implications too, which affect any business which allows devices to be connected to its network.

Revolution: The greatest security risk ever known



This is the revolution that weaves through all the other revolutions... because any time there is change, it creates an opportunity for cyber criminals, and change is constant right now.

I've never seen as many threats to financial firms like yours as I see today. It's increasing year after year. If you saw everything I saw, you'd be excused for not sleeping well at night.

I'm not exaggerating. Cyber criminals are getting smarter and smarter. They're using automated tools to target all businesses, all the time. It really does only take one person to click one bad link in a fake email, and you've unwittingly let them in to your entire business. You won't even know they're there until they strike, often weeks later.

There is very clear and solid security 'best practice' that you should make sure everyone in your team sticks to, and I'm constantly assessing new cyber security tools to help keep my clients safe. I'd be happy to talk these through with you.

Things are changing at such a pace, it's too easy to feel you are falling behind. Even as technology experts, my team and I have to work hard to stay on top of everything that's happening.

Let me make it easy for you with a simple technology strategy I believe you should focus on: **Defend** and **Invest**.



Defend is about protecting your business from cyber criminals



Invest is about making sure technology is powering your business forward, not holding it back

I suspect that you're reading this guide because you're not 100% happy with your current IT support company and are looking to change.

Of course, I'd like you to switch to us!

I've written this guide to help you understand how a trusted IT support partner behaves, and what great IT support looks like.

I'll explain why we genuinely partner with our clients and refuse to become just another supplier. I'll also explain why it's critical you put your IT strategy and data security at the very core of your long-term business planning.

If you're ready to talk before reading further, flick to **Chapter 11** to arrange a conversation. And let's see how we can partner to help your business.



Mark Dodds, co-owner of Compexit IT

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CHAPTER 2

You've got a business plan.
Do you have an IT strategy?



When did you last update your IT strategy?

If you don't have one, or if you haven't given it much thought over the last few years, now is definitely the time to develop one.

If you use any technology in your business – whether that's something as simple as a till, or it's a full-blown network for 5 locations – a proper IT strategy will be your best friend. It's the foundation to growing your business. It can mean the difference between surviving a time of uncertainty and thriving through it.

OK, I'm biased! But I cannot stress enough how important a well-thought-out IT strategy is for any successful business.

Your IT strategy should work alongside your business plan, detailing the ways your technology will accelerate progress towards your goals and objectives. It should take into account both long and short term targets, and leave room for change where necessary.

And while it's called an IT strategy, it's not actually about your technology. Sure, you'll have plans for the technology and devices that you use, and those that you want to use in future but, in reality, the strategy is about your business, and how your technology can help you to achieve all the things you'd like to, in the easiest way possible.

A great starting point is to take a look at your current IT infrastructure. What works well, and what would you like to improve? As your business grows, will your technology grow with you, or will you need to look at new software, networks, and even phone systems?

Speak to the people working in your business. What do they think works really well, and what would they change if they could? Are there parts of your infrastructure that actually hinder what you're doing? Could you save time if you switched over to different software, or if one application could communicate with another one?

When you're working with an IT support partner, they will be able to help you identify the right hardware and software. They will make recommendations based on the way you work, and the ways you want to work. They should even be able to spot potential issues that you hadn't noticed, and suggest a simpler way of doing things.

A technology roadmap as part of your strategy will help you to budget better and know what you'll need to invest in, and when. It'll stop those surprise costs and random invoices you didn't budget for.

It can seem a little complicated to do this yourself, but if you're working with an IT support partner, this is definitely something they should be getting involved in too.

Now, more than ever, every spend needs to be justified. Every investment needs to work hard for your business. You want value for money from everything you do.

Create a range of metrics to help you track how well your infrastructure is actually working for you. It's nice that your team like the way a certain system works, but if you're not getting a return on your investment then it's not working as well as you might think.

Your IT support partner should also get involved with regular strategic reviews. It's up to you how often you do these, but I would recommend at least every 6 months you should look at what's going well and what's taking longer than you'd like it to. A few adjustments may be all it needs to get you back on track towards hitting your goals.

And this is why I keep talking about an IT support partner. Not an IT support company, not an IT support provider. A partner.

Imagine an office building. It has a cleaner who comes in every evening and cleans up the mess that people make.

That's how lots of IT support companies work, they just clean up the mess.

We actually prefer to work as a facilities manager. This person is constantly thinking and planning. They schedule what maintenance the building needs, they look at what they can proactively do to stop it falling into any level of disrepair.

Yes, there's still an element of managing the cleaners and making sure they've done their job, but they're proactive enough to stop most of the problems happening in the first place.

That's what an IT support partner does. We take a proactive approach, we do as much as we can in the background to stop things from going wrong in the first place.

Of course, things will still go wrong. Unfortunately, that's inevitable when it comes to fast moving technology and data, but that's when the clean-up work happens and things get fixed. All of that proactive work means that we need to clean up a lot less than an IT support company that doesn't work proactively.



What my team and I like to do for our clients is to create ongoing technology roadmaps. It means that both you and I know exactly:

- What will be happening over the next 2 to 3 years
- What technological investments you need to make

And there are no surprises. It's all planned and regular strategic reviews help us both to move in the right direction.

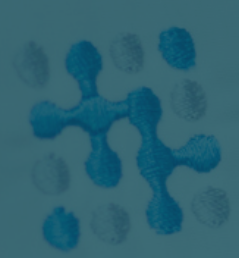
This roadmap also allows us to see what can be delayed (if there's a problem), what investments are critical and similarly, if you're ahead of things financially, what can be brought forward.

In large part, it's our partnership that allows this in-depth planning to take place. We get to know your business as if it's our own. We're constantly working with you on your business and learning more about you and your team.

This commitment makes it so easy for my team and I to help you because we know (just as well as you do) where the business is going.

CHAPTER 3

Why business owners & managers switch IT partners



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I hear from a lot of businesses who are unhappy with their current IT support provider

These are the top 10 reasons people want to make the switch to a new and improved IT support partner:



REASON TO SWITCH 1) **YOU'RE NOT SEEING BUSINESS RESULTS**

Return on investment is everything, especially right now. You need to be able to see at a glance exactly how hard your IT partner is working for you, and what benefit that work is bringing to your business.

An IT support partner should not only provide a detailed IT strategy for the long and short term, they should also give you a set of metrics which you can measure results by.

And these metrics should be relevant and important to your business. Not a standard set issued by the IT support partner, not convoluted with jargon. I've heard too many stories of IT companies providing very vague metrics that are impossible to decipher. Avoid!



REASON TO SWITCH 2) POOR COMMUNICATION

This can cover a whole range of issues... from it taking far too long for them to acknowledge problems... to them not letting you know when updates are taking place... or not getting back to you when they say they will...

If we were talking about any other kind of supplier, these gripes might seem a little petty. But as we know, without working technology, your business can't run as it's supposed to, and these little gripes become huge issues.

Again, this is another way for you to distinguish an IT support provider from an IT support partner.

You need a responsive IT support partner who:

- Acknowledges issues in good time
- Keeps you in the loop of everything that you need to know, and
- Does what they say they'll do, when they say they'll do it

Just as your success is their success, your failure is their failure. So the faster an issue can be resolved, the better it is for both parties.



REASON TO SWITCH 3) THEY DON'T TAKE DATA SECURITY SERIOUSLY

Yes, you read that correctly.

There are some IT support providers – whose job is to keep your data safe and secure – that don't do the same thing within their own business.

They don't make it a priority to keep themselves educated on the latest scams and threats, so they can't keep you up to speed.

And they won't go out of their way to ensure every last part of your data is as safe as it can be, or that your software is 100% up to date all the time.

I know... this scares me too...

Is this really a company you'd want to be responsible for keeping your business safe from the growing number of data breaches?



REASON TO SWITCH 4) THEY WON'T GO OUTSIDE OF THEIR CONTRACT

"Sorry, we don't cover that."

Ever heard that from your IT support provider? Lots of businesses have, but so long as the request relates to your technology, it should be a red flag.

"We don't cover that" suggests a real lack of concern for your business, and that's not what a partner is about.

A partner actively spends time looking at new ways to improve your network, your data security and your infrastructure. They won't be working rigidly to a one-size fits all contract.

And that's just the point. One size doesn't fit all, because each and every business is unique. Even two businesses in the same street, selling the same product or service will have a different way of working. They'll use different software and devices, have different people working with them, and importantly, have different goals.

You need an IT support partner that will take your goals as their own and do as much as they can to help you reach them.



REASON TO SWITCH 5) THINGS TAKE TOO LONG TO FIX

Understandably, many problems can't always be fixed immediately. Some issues take a while to get to the bottom of, other problems are rare and may take a little more diagnostic work.

But in these situations, good communication is key.

It might take you a while to see a resolution, but if your IT support partner is keeping you updated at each step, you're confident it's in hand.

Whereas if your support request is still waiting for a response three days later... you've got a problem.

And would you believe that some issues never get fixed at all? Or that one thing gets fixed only to break something else?

This is technology we're talking about. It goes wrong, it doesn't always work the way we want it to.

But you absolutely should not be facing issue after issue, waiting days to have problems resolved. You should not face silence when you need help.

All that waiting means downtime for your business. Where's the value for money in that?



REASON TO SWITCH 6) THEY NEVER ACCEPT RESPONSIBILITY

When you take on an IT support partner, it's vital that both businesses take responsibility for their side of the agreement.

Failing to do so causes a huge lack of trust, and means that the relationship is going nowhere.

I've heard from business owners who have reported an issue to their IT support provider, only to be told that it's their fault that the issue arose!

(despite them following advice and instruction from that same IT support provider)

I've also heard from business owners who have reported issues to their IT support provider, only to be told that they need to contact someone else (such as a software supplier) about the problem.

The idea of an IT support partner is that you trust them to deal with their area of expertise, while you get on with yours. If they're passing the buck when you face a problem, you're not getting the benefit of a support partner at all.



REASON TO SWITCH 7) THEY CONFUSE YOU WITH TECH TALK

If technology wasn't complicated, everyone would be able to take care of their own business infrastructure without a problem.

However, the truth is quite the opposite. It's full of strange words and concepts, and everything changes every 7 minutes! (it seems that way anyway).

It's a minefield if you don't know what you're doing.

The hallmark of a good IT support partner is that they take this complication and make it look easy. Better still, they make it sound easy. They explain things to you without sounding like they're speaking a foreign language.

Again, it all comes down to your connection as partners; if you can't communicate properly with each other, how fruitful is this relationship really going to be? The likelihood is that it'll leave both sides frustrated, and your business won't be able to make the most of the technology it has.



REASON TO SWITCH 8) YOU'RE NOT LEARNING

We're not expecting your IT support partner to teach you their job. You don't need to be an expert in IT - that's what you're paying someone to do for you. However, there should be a certain element of learning when you partner with an IT company.

For example, you need to learn about cyber security, how to avoid scams and how to protect your data.

If you're told "Let us worry about that", it should ring alarm bells. You can't expect to keep your organisation safe from a data breach or data theft if you don't know what you're trying to protect yourself from.

It's also important that your IT support partner explains what they're doing, you really do want to have a basic understanding of how your infrastructure works or is set up for you. This will help you to help yourself when a minor issue occurs.



REASON TO SWITCH 9) THEY'RE ALWAYS PUSHING NEW HARDWARE

Many of our clients complain that their previous IT support providers spent more time pushing new equipment than they did on the fundamentals.

It's nice to have the very latest technology in your business, but it's certainly not vital. There are lots of other things to consider before upgrading equipment and devices, especially today when value for money and return on investment are critical.

Of course, your business will need a certain level of equipment for you to operate the way you need to, but you probably already have most of the things you need. I find that for most businesses, it's far more important to get the infrastructure right before we even consider your hardware. Additional devices, for example, are sometimes nice to have rather than crucial.

A good IT support partner will help you to create an IT roadmap, which should detail at which points in the years ahead you need to budget for upgrades or additional devices.



REASON TO SWITCH 10) YOU'VE OUTGROWN THEM

Now, this last one isn't necessarily a bad reason to switch IT support partners. Sometimes, your business simply grows too big for a smaller IT company to deal with.

That's actually great news for you. The difficult part can be knowing when to make the switch, especially when you're working with a company that you like.

It's worth keeping in mind that if:

- Your support requests aren't being responded to as quickly as you need them to be
- The recommendations on how best to use technology to grow your business have stopped
- Or you need a higher level of support

... it's in your best interest to find a new IT support partner.

If you've noticed you need more support, your IT support partner has probably noticed too. In fact, if they're good partners, they may even discuss this with you first. Trust me when I say there will be no hard feelings; no company wants to be out of its depth with clients.

If you've ever felt any of these gripes, maybe now is the right time for you to make the switch too?

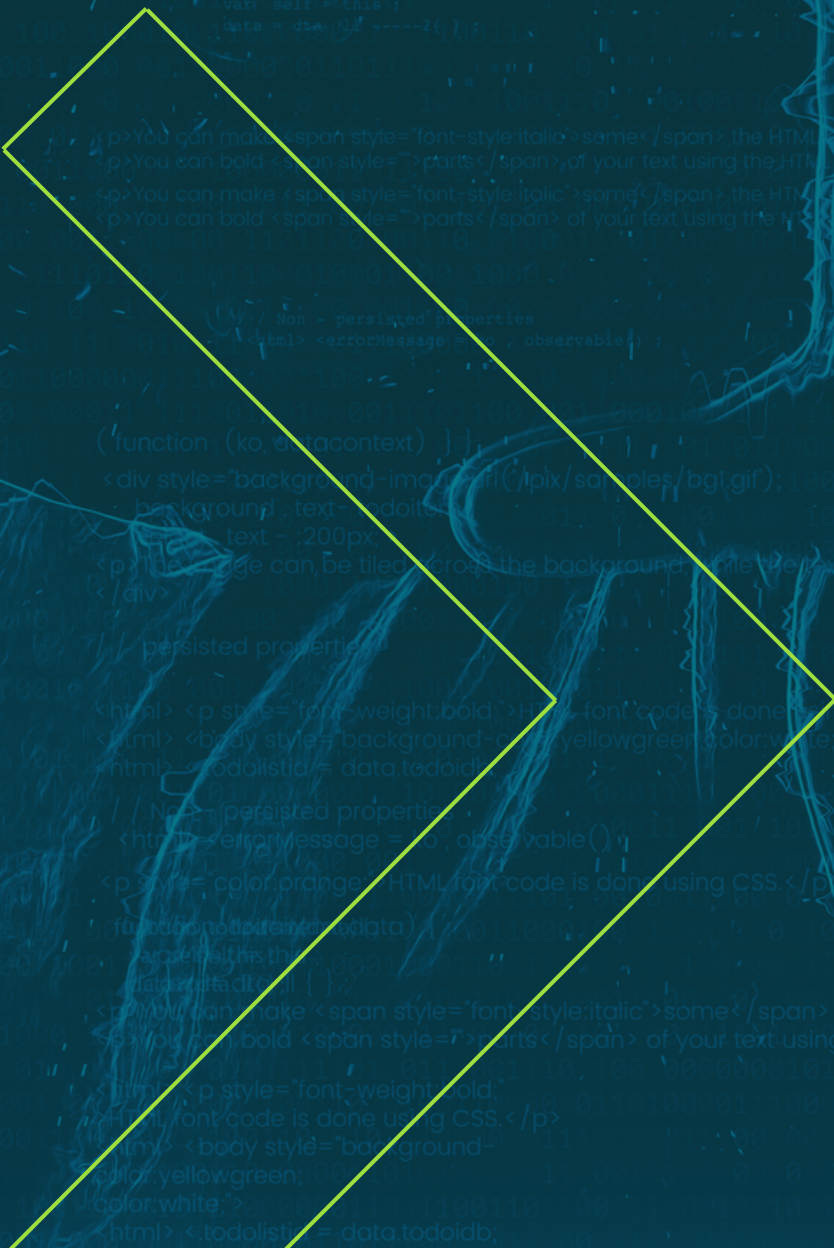
When you place your technology at the heart of your business growth strategy, you see why it's important to have a partner you can trust.

No business is perfect. Inevitably we get some things wrong for our clients some of the time, because we're human too.

But because my team and I have partnerships with our clients, we're able to have adult conversations and change course quickly. We don't have to spend unnecessary time repairing relationships, instead we can set the correct expectations and resolve issues quickly.

CHAPTER 4

Protect the most important thing in your financial firm



As we've seen over the past few years, being able to work anywhere, any time, on any device is liberating.

Working flexibly like this means that businesses can reduce their costs, attract the best candidates for jobs and have a happier workforce too.

But as our devices get smarter and more powerful, they're also becoming more disposable. As you'll know, you can do most things on your phone now. And how often do we lose or break them?

The thing is, because everything is stored safely in the cloud (that's the huge servers where you store your data, in multiple locations across the globe), if you lose your phone, it's no big deal. You simply get a new one and restore your files from your backup. Just like magic, you have a new handset that contains all the data your old one had.

A lost phone is now merely a minor inconvenience and a small financial cost. And it's not just phones this applies to, your tablet and laptop work the same way.

This flexibility is amazing. However, it also has its risks. Number one being that any time you take your device away from the office, you're potentially opening up your data to anybody. The sad and scary truth is that there are many cyber criminals who are trying very, very hard to access your data and even take it away from you.

You've probably heard about malware before. Malware, or malicious software, is code placed on a device or network with the aim of infecting, stealing, or corrupting your data. Essentially, a hacker can create malware to do exactly what they want, once it's within your network. It's a pain, because once it's there, it can take you a while to notice what's happened. And it can be very difficult to remove.

But there's something scarier: Ransomware. This is the fastest growing cyber crime right now and if you're not taking all the right precautions, it's likely that you will fall victim to this devastating form of cyber attack at some point.

As the name suggests, ransomware is a kind of malicious software that encrypts your data so you can't access it. The hackers then literally hold you to ransom to regain access – you must pay a fee.

For example, they might ask for £5,000 – in Bitcoin, of course – within 3 days. If you fail to pay, this fee doubles. If a week goes by, you can kiss your data goodbye forever.

Ransomware is terrifying. Trust me when I say that you want to avoid this at all costs.

And while absolutely anyone can become a victim of ransomware, it's usually small and medium sized businesses that are targeted. Cyber criminals know this is a group that typically doesn't spend excessive time or money on cyber security.

I don't want to bore (or scare) you with statistics, but it's estimated that more than half of businesses have been attacked with ransomware. That figure is rising every year.

The most common way for ransomware to get on your device or network is by someone clicking a link in a suspicious email. And before your jaw drops that someone – especially someone in your own business – would be naive enough to click a link in a scam email, you need to know these emails are really sophisticated nowadays.

Yes, these emails will look like dead ringers for genuine emails from someone you know or expect mail from – HMRC, your bank, even a department within your own company - and they not only look like the real deal, but the email address may be a very close copy too.

These emails work because they ask you to do something relatively simple; click to update your details, for example. Even looking with a critical eye, it can be hard to spot that something is wrong.

Once that ransomware is installed, there's not always an immediate attack. In fact, it can take between 60 to 100 days for anything to happen, sometimes even longer. That's for a number of reasons.

Firstly, the longer a hacker lurks within your network, the harder it is for you to detect them. Usually, hackers enter through one device that's connected to a network. Then they investigate your network for other weaknesses; better for them to have control over as many devices as they can. This can make it virtually impossible to kick them out once the attack has started.

That's what makes ransomware so difficult to deal with and it's why prevention is always better than cure.



You need to be aware of the signs of a hacker in your network. Both you and your IT support partner should look out for:

- Unexpected new administrators appearing on your network
- Software being disabled
- New software being downloaded
- Remote access sessions lasting for days at a time

Of course there are many technical things to look for, but that will give you a good start.

A good IT support partner will always recommend everyone in your business has regular cyber security training. After all, your people are your first line of defence from cyber attack. Software alone won't offer a good level of protection, you need software and humans.

It's important to understand this: you can never be 100% protected from malware, ransomware, and other forms of attack. That's impossible, because it's a non-stop game where the criminals are always inventing something new, and the data security world has to catch up.

It is possible to be 99.99% protected, but you may be surprised to learn that we don't always agree with going that far.

You see, when you lock down **everything** to make your data security watertight, what you can inadvertently do is frustrate and annoy your staff. They'll have lots of extra layers of protection to go through, more steps in an already busy workload, and more to remember.

And what that means in the real world is that they'll skip steps, and look for ways to bypass security, which actually puts your business at greater risk.

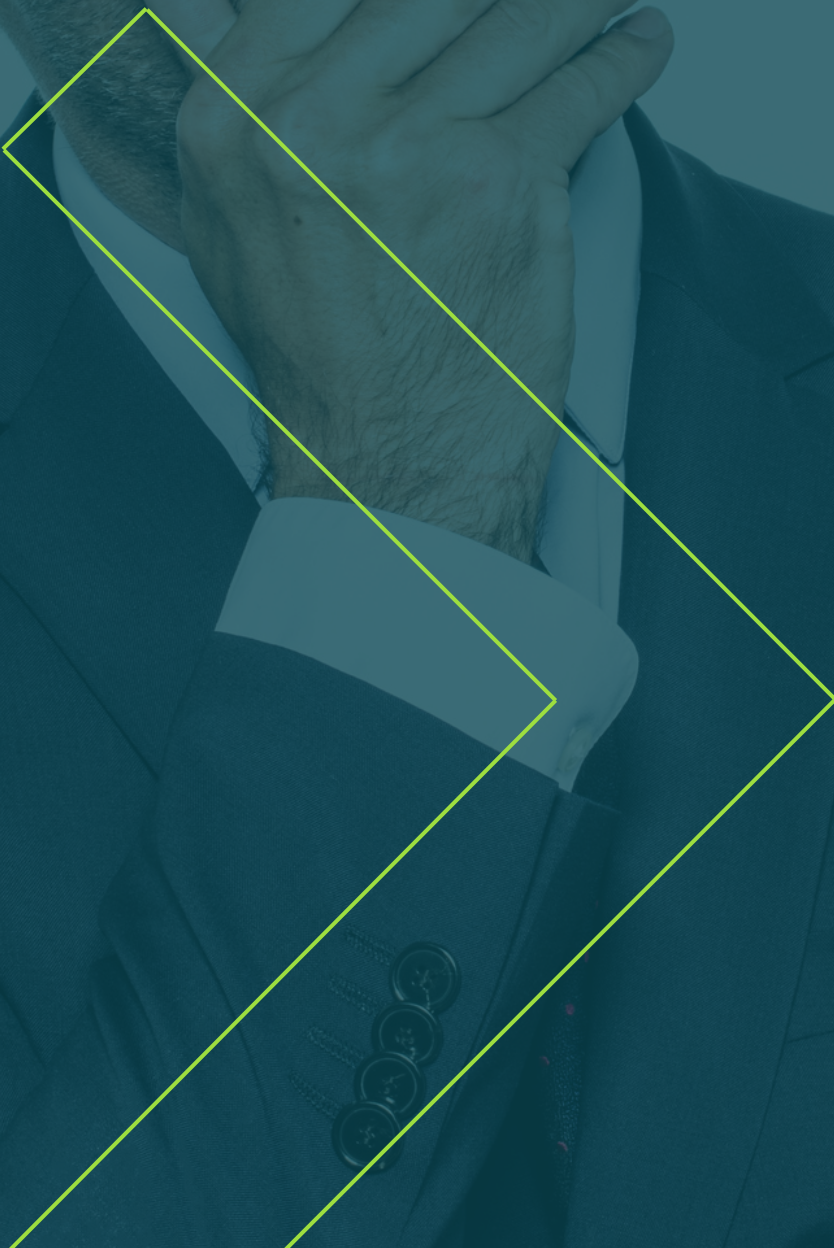
Think of it like a door to an office. If you have seven big locks and a biometric scan just to open it, eventually, people will get frustrated and just prop the door open!

To remove the frustration and hassle, we use what's called "blended security". We combine several products and services, which work together to protect you. It means fewer codes and passwords for your people, and a better level of security for your data.

And the clever part is that every blend will be different, depending on the business it's for. That way we can customise security perfectly for each client, based on their specific requirements.

CHAPTER 5

Why you should be highly sceptical of all IT support companies



You probably don't know what you don't know about IT. Does that make sense?

I think that's a fair assumption for me to make.

And why should you concern yourself with the latest tech news, software, and support updates? You're too busy doing what you do best.

You probably already read your industry magazines, blogs, visit trade shows, go to conferences, and attend training... you're an expert in your field, that's what experts do. You certainly don't have the time to do all of that for your IT as well.

Would you expect your clients to know as much about your area of expertise as you do? Of course not. That's why they hire you, isn't it?

The same goes for us.

We totally absorb ourselves in the highly technical, high speed, rapidly changing world of technology. We genuinely love it and pride ourselves on having a level of expertise that most people don't.

You'd be shocked how many people consider themselves IT experts, simply because they know their way around computers. However, in reality, great IT support companies operate on a completely different level – with better knowledge, tools, and systems.

The biggest problem with IT support is that it's an unregulated industry. There's no governing body that people have to pass through to be allowed to call themselves an IT support company, no industry standard that has to be met, no guidelines on how the business must operate.

Just about anybody... **literally anybody**... can set themselves up and say they're an IT support company.

This is why I say you should be highly sceptical of all IT support companies.

Without asking the right questions, you don't know if you're putting your trust – and the security of your business data - in the hands of a reputable, honest company... or someone working alone out of a bedroom in his parents' house. A bedroom warrior as I like to call those guys.

Now don't get me wrong, there's nothing wrong with bedroom warriors. Everyone has to start somewhere, and if you're a one man band with minimal IT requirements, that could be the most cost effective solution for you.

However, if you own or manage an established, growing business, with staff and more than one computer, you'll need more than one person working from their bedroom can provide.

So how do you avoid choosing the wrong IT support company?

Firstly, look for solidity. You need to check they have the right qualifications, accreditation, and experience. Remember, it's an unregulated industry, so you really need to do the legwork if you want to end up with the best possible IT partner.

Next, ask them some difficult questions.

You don't want to see your potential new IT partner squirm, but you do want to make sure that they are going to deliver what you need. And asking difficult questions is the only way to be sure that you're making the right choice.

ASK THEM: "How quickly will problems be fixed?"

Obviously, this one will depend on the scale of the problem, but you need to know time frames based on severity. How long will it take your proposed IT support partner to acknowledge your issue in the first place? How long do they expect it'll take to get someone working on the problem?

Look at different scenarios. If you can't access your software, how long should it take to get you logged in. How long could it take to get your business up and running if you suffer a ransomware attack?

You also need to understand the approach your potential new partner will take. Do they have processes and procedures they stick to when issues arise, or are they winging it? Can they tell you about the worst problem they've encountered and how they dealt with it?

Remember, it's not the problem that you're judging them on, but rather how they responded to it. This can tell you a lot about their professionalism, knowledge, and ability to remain calm in a crisis.

ASK THEM: “What do you do proactively to make sure my team have fewer interruptions?”

Downtime is a business killer.

You'll have seen it for yourself at some point, either in your own business or one you were working for. The internet goes down, for example, and people can't access the software they need to do their jobs. The office descends into chaos. Even those who aren't reliant on the internet stop doing what they're doing. The coffee machine goes into overdrive. Everyone forgets about their job for a while and makes the most of an unofficial break.

But then when things are up and running again, people don't immediately get back to business. Conversations are finished, systems are rebooted, everyone needs to regain their focus. And that often takes even more time. So what should have been a 15 minute interruption loses you 90 minutes of work.

And that's if it's a minor problem.

So, what can your IT support partner do to minimise this downtime?

Will they be working away in the background, making the necessary checks to ensure that the majority of these little blips don't arise? Can they assure you that most updates and maintenance will be done outside of working hours?

Do they have any other solutions that will mean your business maintains productivity while essential work is taking place?

ASK THEM: “Tell me about the specific people who’ll be looking after us.”

Though it’s a really important question, many businesses overlook this side of things when it comes to working with a partner.

It’s really good to know about the actual people you’ll be working with. The people behind the business.

How does your proposed IT support partner assign your account manager, for example? Do account managers have an area of sector expertise? Do they match you on how your personalities may work together? Or do you simply get assigned to the person with the smallest workload?

Will you always be speaking to the same person? What happens if that person is on holiday or ill? Who will be doing your strategic IT reviews and building your technology roadmap? Who do you talk to if you’re not happy?

This question is a great way for you to get to know more about the company you’re hoping to work with, but it’s also a great way for you to figure out if their people are the right match for yours.

ASK THEM: “Can you explain something deeply technical to me?”

With this question, I’m not suggesting that you actually try to learn the ins and outs of building an IT infrastructure from the ground up. Rather, it demonstrates your potential IT support partner’s ability to explain things to you in English, not tech-speak.

Can they explain a really complicated, technical process to you in a way that you can understand? Do they get frustrated if you ask too many questions? Do they brush you off with ‘you don’t need to know the technicalities of that’?

It’s vital, if you are partnering with someone, that you can communicate with each other clearly, without any confusion or breakdown.

It also demonstrates their ability to educate you.

ASK THEM: “How will you keep on top of the constant changes in my business?”

It's no secret that successful businesses deal with a lot of change. From adding new staff members, to tweaking the product or service you offer, it's likely that your business is forever changing things. It's the way we grow.

In fact, your business probably looks very different now to how it looked just 12 months ago.

So how would your proposed IT support partner cope with that? How much do they need to know about these changes? Will it affect what they're doing for you?

It should. Remember, you're looking for a partner here, not just another supplier. It's part of their role to be able to make recommendations based on how you're working, to suggest better software to use, a smoother network, more appropriate security.

If they can't keep track of how many people are working for you, or the ways you deliver your service, how can they suggest ways to grow, improve – and especially, stay secure?

Look for a new partner that takes an active interest in the changes happening within your business. Perhaps even arrange regular catch-up sessions to ensure they're on top of everything that's going on.

There are lots of other questions that you should be asking, but I feel these are the 5 that will tell you the most about your potential partner.

CHAPTER 6

What every IT support company wishes you knew about IT



Before you glaze over and flip past this chapter, I'll add my disclaimer here: I am not about to bore you with technical jargon or gobbledegook. Please do not panic!

What I am going to talk about are the basic things that – if every client knew them – would make our lives a lot easier.

#1: YOUR SETUP NEEDS CONSTANT MONITORING AND MAINTENANCE. IT IS NOT A ONE-OFF JOB



Computers and other devices ask you to update them all the time, and that's because things are constantly changing.

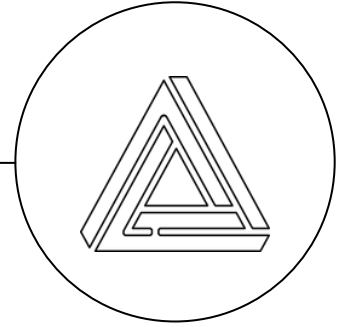
The same applies to your network and infrastructure. Software is always changing, operating systems are being tweaked and hardware deteriorates. It literally never ends.

It's virtually unheard of in professional IT circles that an IT setup isn't constantly monitored and maintained. If you're not offered 24/7 monitoring and maintenance as part of your IT contract, run a mile. You will start seeing issues before the ink on the contract is dry.

Most IT support companies do it all in the background and you simply never hear about it. In fact, a great IT support partner will spend a lot of its time monitoring what's going on within your system, and fixing issues before you even realise you have a problem.

You'll simply never notice its going on, and really, that's exactly what you want; monitoring and maintenance you don't even notice.

#2: THE SUPPORT TRIANGLE IS LIKE THE HARDWARE TRIANGLE



This is a fun concept to learn about buying hardware.

Picture a triangle in your mind. The three equal sides of the triangle represent quality, price and speed.

If you make one side longer, then all the sides will lengthen to keep the triangle together. For example if you pick a faster computer, typically the quality and price will also increase.

IT support has an identical triangle with the same three sides: Quality, price and speed.

If you buy cheap IT support, it'll be slow and lower quality and vice versa.

Ideally, you'll look at what you can realistically afford to spend on IT support, and go with the top of your budget. That's because you understand IT support is actually an investment into your business. Get your IT setup and your business IT strategy right, and it makes hitting business goals so much easier.

#3: BEWARE THE BEDROOM WARRIORS



Let's go back to them for a moment.

Picture a guy, sitting in his bedroom, carrying out your IT support service. He hasn't got the overheads we have, so of course his service will be a lot cheaper.

But remember the triangle – his speed will be slow and he won't have access to the professional IT tools, because they're expensive.

If you choose a bedroom warrior, doing everything themselves, to provide your IT support – that's fine. Providing you're their only client. Realistically, one person should be able to carry out the IT support, maintenance, and monitoring that a business like yours requires.

But what happens when he gets another client?

And another? And then realises, because he's cheap, he needs even more clients just to make a decent living?

The quality of the service you receive falls, as does the speed in which he reacts to your problems. It's likely that he'll also stop doing the proactive work for you, because one person simply cannot service a large number of clients properly.

Yes you pay more for a larger business with an office, team and all the tools, but you also know that they're set up to keep service levels high, no matter how many clients they take on.

#4: WE ASK FOR A LONG-TERM PARTNERSHIP TO PROTECT YOU MORE THAN US



We don't want to work with people short-term.

We refuse to do ad-hoc work, and one-off crisis management.

We only want to work with businesses as part of a long-term partnership.

Why?

Well, obviously, it's good for us to build our own business around long-term clients. It's a great business model, if we're honest.

But the real benefit of long-term partnerships for us comes from the investment we're able to make in our clients, so that we know you inside out. It means we can:

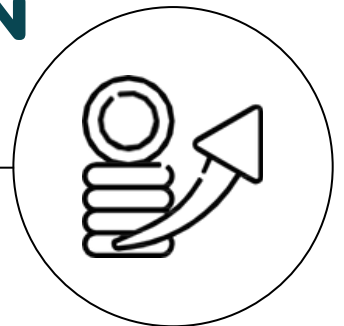
- Work more closely with you
- Learn about your priorities and take an active part in getting you towards your goals
- Customise your infrastructure and IT strategy around where you're heading, rather than where you currently are
- Build an infrastructure that grows with your business

- Keep you better protected, because we can take an honest and strategic approach when we work as part of a trusting partnership.

When you work with someone on a short-term basis, it's impossible to do this.

A long-term partnership means we'll be as invested as you will be because we genuinely care about your business. If you're doing well, we are too.

#5: OUTSOURCED IS BETTER VALUE FOR MONEY. AND IT HELPS YOU ACCESS BETTER EXPERTISE THAN THE SAME SPEND IN-HOUSE



As you're reviewing your IT support, it's probably crossed your mind that you could hire an in-house employee.

There's a big downside to be aware of. When you have an in-house person, you're asking them to do several different specialised jobs, and support a huge number of people, all at the same time.

Someone who can do that without having some kind of breakdown would be hard to find! Certainly they'd soon learn to cut corners, just to get home on time each day.

When you outsource this work, you might pay a little more than an in-house person, but you're gaining access to multiple people, with a broad range of skills and specialities. And they don't go home until the work is done.

CHAPTER 7

How to help your internal IT people, if you have them



Sometimes, the businesses we work with have internal IT people. And a senior member of staff who takes on responsibility for the IT, without actually having a background in IT themselves.

If that's you, then you should be scared. Terrified in fact.

Not because you don't have the skillset, but because if your IT goes badly wrong – I'm talking ransomware attacks or similar, large scale problems – the responsibility rests with you.

Luckily, there is a solution to protect both you and the business. It's called co-managed IT support.

You retain your in-house IT people, and we help them with whatever support they need, at whatever level.

The best way to describe our help is to imagine a ring donut, with your internal IT person in the middle.

Yes, it's a big donut!



They benefit from support all round:

- At the bottom: Help with handling the low-level stuff that's important but can be overwhelming, such as being the help desk for your staff, monitoring the network, rolling out updates
- At the sides: Support at their skill level, to help them cope with workload, and have direct access to an experienced IT team to bounce ideas off
- From above: High level strategic advice and long-term planning

Our job is to complement your internal IT people, but add in the partnership and strategic overview so there's plenty of high level thinking and support on tap.

This gets the most out of your internal resource and also fully protects you, as the person with ultimate responsibility.

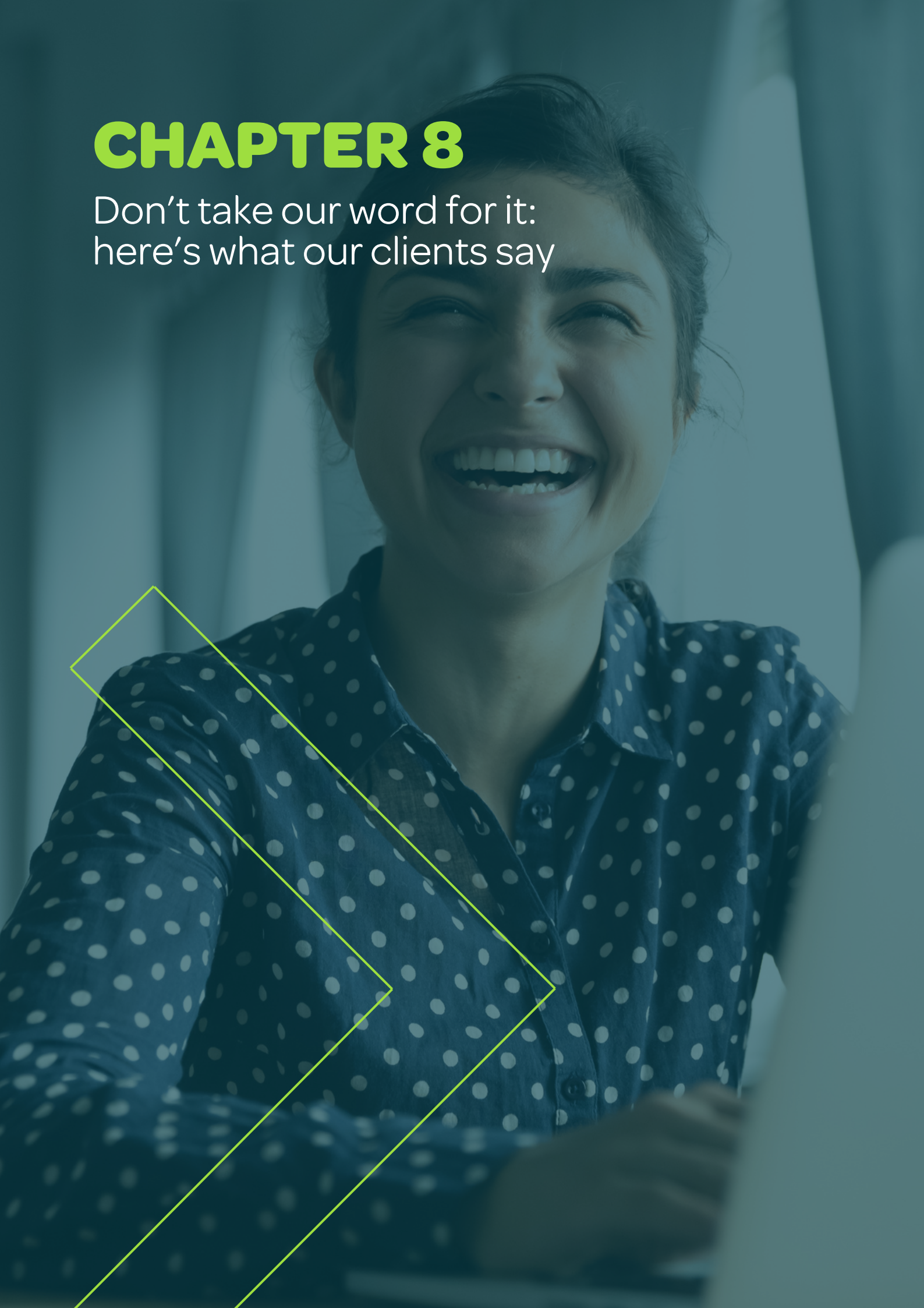
Some IT managers see outsourced IT support partners as a threat.

We are not a threat.

**Our job is to make you and your internal IT people look great, and operate brilliantly.
When you look great, so do we – everyone wins!**

CHAPTER 8

Don't take our word for it:
here's what our clients say



I've spent a long time in this guide educating you how to buy an IT support service. I've covered all of the bases, and by now you should really know what you want and need in your own IT support partner.

But it's all very well me, the owner of the business, telling you how an IT support partner can change your business.

It's time you heard from some of my clients about the reality of working with us.



What our clients say.

We knew from the get-go that Compex IT stood out. They gave us the confidence we were looking for. Their investment into both their business and ours was something we hadn't seen from any of the other IT suppliers we spoke to. They mirrored so much of the way that we like to work for our clients that it just seemed like the perfect fit.

They really set the bar and even the bigger corporations we spoke to didn't come close. We knew that Compex IT was a company we could work with, a company who don't speak in jargon, who know how to help you understand something and who really want to make it work.

Although they're a smaller organisation, 100% Compex have gone above and beyond any bigger organisation we've ever worked with. They're professional, they're trustworthy, they're honest. They talk in real terms and they actually care. We know they want us to do well and we sincerely want that for them as well.

Annemarie Byrne
MPA Financial Management



What our clients say.

Our business is a growing business, and this is exactly the kind of help we need with our IT and tech. They help us look at things not just for now, but for later too. Our systems can grow with us and there won't be unexpected costs later down the line. We are so happy that we came on board with Compex IT and we can't wait to continue the relationship for years to come.

Sara Boutsalath
David Paradine Ltd



What our clients say.

...to innovate, which is incredibly...
...we have been able to...
...work. We are much...
...communication



What our clients say.

...IT
...people first

...othed away the IT related pain that we...
...a daily basis. These guys set the...
...st which other companies within the...
...y should measure themselves.

What our clients say.

What I didn't realise when we started working with Compex was how much 'value add' they would give us. They've helped us adapt systems, websites, done presentations to the team on how to be more efficient.

Steve Rowe



What our clients say.

I know that if I have a problem, they'll get right onto it and sort things out. In a nutshell: they get s*@\$ done! They're the best. They're down to earth, friendly and really reliable - I can't recommend them highly enough.

Hannah Knight
Lucent Financial Planning



SVM Associates

What our clients say.

...s say.

...for communication and output.
...ompex, IT was talked about
...xcellent work of the Compex
...mentioned, and confidence



What our clients say.

Before Compex, we struggled to find an IT company who understood what we do and how we need to operate. It was also difficult to find a company with a clear point of contact who we could build a lasting relationship with.

Amanda Duignan
ESC (UK) Ltd



What our clients say.

I have nothing but admiration and gratitude for the professionalism Compex have provided and looking forward to continuing to develop innovative solutions for our company in the future.

Andrew Percival
Renuvo Ltd

CHAPTER 9

About us



I love our clients. They always have such wonderful things to say about us.

Let me now properly introduce myself and my business.

Who am I?

Hi, I'm Mark, I'm co-owner and consultant at Compex IT. I've always been passionate about IT. I knew that my career would involve computers and technology ever since I left school and was hired in my first job as a trainee support technician, I loved that job staying there for many years – fixing computers and helping people. That was 20 years ago – and today I'm still in love with IT, computers and technology.

I've worked at Compex IT for the last several years and I'm passionate about the work we do, I relish being able to run it our way and making our clients happy!!

Who Are Compex IT?

Compex IT was born when a large precision engineering company enlisted Gary Alsop (our Managing Director) to help them respond to technological advances and take their business to a new level. Their success got people talking and soon after, other companies were asking for support with their own technology and IT strategies; not only engineering and manufacturing companies but a huge range of other businesses.

Now, more than 65 businesses in Birmingham trust us with their IT Everyday.

What makes us different?

Because we support people first...before the technology!

We strongly believe that a productive workplace is a happy one, and vice versa. Our clients count on us to equip them and their team with the right tools for the job.

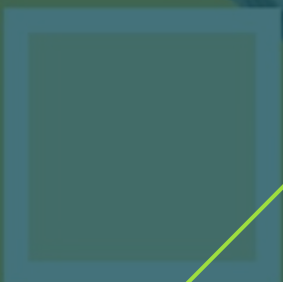
We're big fans of technology but never lose sight of what's really important – people.

Your people are our primary focus. We support the users of IT, ahead of the IT itself. This approach allows us to ensure your people have the right tools, which are supported to work for them, and not the other way around.

The result: a happy, busy team and satisfied customers.

CHAPTER 10

What will happen during your first 90 days



If you're ready to explore working with us, here's some important information you need to know.

When we begin to work together, the first 90 days are the most critical.



My team and I will be working on three key areas:

1. Learning as much as we can about your business
2. Fixing any outstanding problems left behind by your old IT company
3. Creating your technology strategy

I hope and expect to work with you for years to come in our partnership, so my goal in these first 90 days is to set you up for success.

You'll know what we can and can't do, with realistic expectations, what we need from you and how to be a great partner.

We'll survey absolutely everything, and examine every tiny part of your current IT setup. The more we know the better. All of the answers are fully documented in our secure systems.

We'll even ask about your website hosting and examine any specialist software you use. Even if we're not directly supporting these things, we still want to know how it works and who's supporting it. At some stage in our relationship, you're going to ask us about it, so we need to know about every single service or third party vendor you're currently using.

Of course, it will mean there's a little work for you and your team, but I promise it will be worthwhile and you'll only need to do it once.

Once my team has all the information, they'll strategically analyse it to make sure they understand every aspect of your technology. Any IT support company that doesn't do this is simply not doing their job properly.

Then we're going to talk to your team. Every single one of them.

We'll find out what their existing IT problems are, what frustrates them and what makes their job more difficult. We'll also review anything your previous IT support provider told them couldn't be done, fixed, or created. There's no promise we can make it happen, but of course we'll try.

Your first 90 days are going to reset everything and then get your entire IT setup back up to the high level it needs to be (and where it will stay).

Then – and only then – you and I begin our strategic, forward-thinking work together.

This is a unique process for every client. I can tell you more about it when we talk.

Here's what to do next.

CHAPTER 11

What to do next



I hope you've found this guide useful, and it's covered many of the questions you've had about choosing a new IT support partner.

Perhaps it's made you look at your IT support in a different way?

Good news – we're currently taking on new clients again. That's why I wrote this guide.

I'd really love to talk to you about your business.

If you're serious about working with a new IT support partner to improve your business and contribute to long-term growth, this is your next step:

Book a 15 minute, no obligation video call with me at www.compexit.co.uk/letschat

You'll see my live calendar on that page.

You and I can check that our businesses are a good fit, and arrange a longer video call, or physical meeting (whichever is most appropriate).

Of course there's no obligation to buy anything, ever.

I'm looking forward to speaking to you, and learning about your business.



A handwritten signature in black ink that reads "M Dodds".

Mark Dodds, co-owner of Compex IT

0121 296 2500
mark.dodds@compexit.co.uk

This is how you can get in touch with us::

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 www.compexit.co.uk

 www.linkedin.com/in/markdodds1

 www.facebook.com/compexit



COMPEX IT

Supporting people first