



IT NATION™

SECURE

hosted by  CONNECTWISE

Reminder Session Description

Don't Miss Your Targets:

Applying Modes, Maturity & Matchmaking to Your Cybersecurity Practice

What separates business owners with cybersecurity practices who achieve their targets from those who don't? Decades of experience with thousands of partners reveals business owners collaborate with leadership teams to make decisions, execute, and achieve targets along three primary dimensions:

1. **Mode** - they know who they are and what they are trying to build.
2. **Maturity** - they keep score, measure success, and benchmark against others.
3. **Matchmaking** - they leverage the right tools and people to help achieve their targets.

Join this session to hear from partners with cybersecurity practices and ConnectWise SMEs about how these dimensions **impact partners' growth**. How did defining their Mode clarify their **direction and team alignment**? What matters when **keeping score**? When is it best to leverage **tools and people outside your organization**? Learn how you can apply lessons from these and other partners.



Don't Miss Your Targets:

Applying Modes, Maturity & Matchmaking to Your Cybersecurity Practice

Panelists:

Mike Ritsema

President

i3 Business Solutions

Tim Weber

VP of Channel Growth

Cyber74

Presenters:

Brad Schow

VP, Business Transformation

ConnectWise

Scott Scrogin

IT Nation Innovation Director

ConnectWise



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Agenda

1 INTRODUCTIONS

2 MODES, MATURITY & MATCHMAKING

Brad Schow & Scott Scrogin

3 PARTNER JOURNEYS & LESSONS LEARNED

Mike Ritsema & Tim Weber

4 Q&A

Everyone

5 NEXT STEPS & SESSION SURVEYS

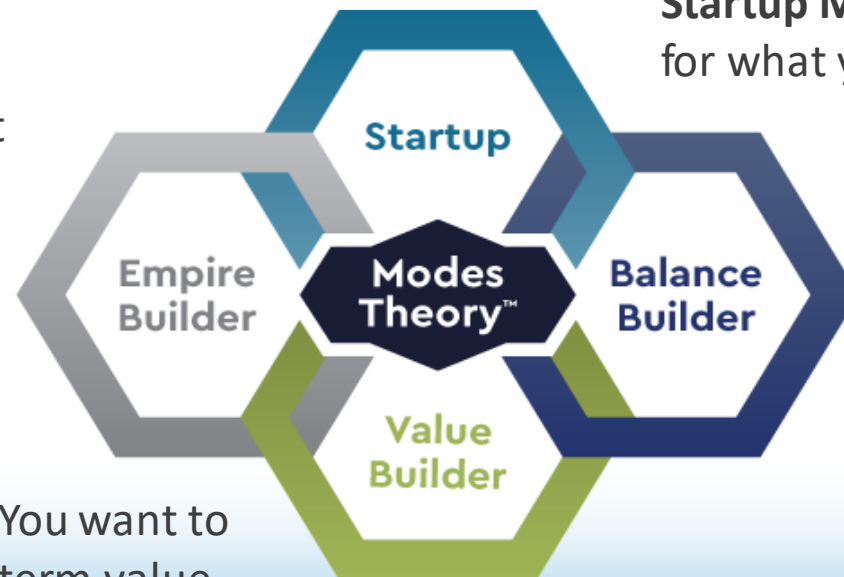
Everyone

3 Foundational Questions + 4 Modes Mindsets

1. **What** is your destination? What are you trying to build?
2. **How** will you get there? What does your journey look like?
3. **When** is your timeline? How long do you have?

Empire Builder Mode: You want swift growth and will make short-term sacrifices for substantial opportunity.

Value Builder Mode: You want to build consistent long-term value and profitability.



Startup Mode: You are open to many possibilities for what your company will become.

Balance Builder Mode: You want success but won't sacrifice your personal life to get it.

Which Modes Mindset™ below best describes your organization today?

The **Startup** company travels a chaotic journey not yet defining what type of company to become. **Startups** create a business while attempting to put in place the necessary people, processes, and plans to create their desired outcomes. They strive to create the momentum needed to advance to another Modes Mindset. They have little value creation in this Mode.

- Draw on energy for growth
- Difficulties in balancing work and life
- Financial discipline and oversight not in place to run the business following Best-in-Class financial numbers
- Usually live to work

The **Value Builder** focuses on creating consistent increases towards a targeted value at a set time. **Value Builders** are intentional about growing profitability through incremental improvements in performance. Financial reward is most common at the owners' exit.

- Consistent planning to achieve steady growth
- Strive towards becoming Best-in-Class
- Developing organizational culture and structure
- Usually live for a secure and better future

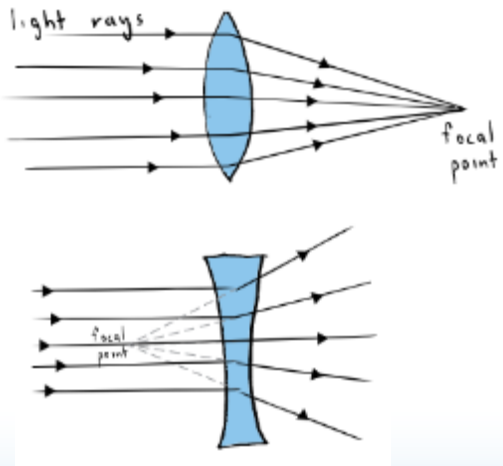
The **Balance Builder** wants success but chooses not to trade the owners' personal lifestyle to achieve financial success as a priority. **Balance Builders** strive to find the right clients, team, and profitability level to match their personal desire for lifestyle. They may mistake hard work for value creation at exit.

- Associated with flexibility and freedom
- Stable customer base and employees
- Minor changes for controlled growth
- Usually work to live

The **Empire Builder** commits to extremely fast growth and value creation. **Empire Builders** trade time and control today for the resources and execution required to reach defined goals and opportunities tomorrow. Often external sources fund rapid growth through mergers and acquisitions.

- Extremely focused on timelines and company targets
- Striving to scale sales and operations
- Disciplined planning processes and organization culture of accountability
- Usually sacrifice now for future gain

Mode Profiles



CHARACTERISTIC	STARTUP	BALANCE BUILDER	VALUE BUILDER	EMPIRE BUILDER
High Level				
Purpose	Start something	Support their lifestyle	Consistent growth	Exponential growth
Life Focus	Live to work	Work to live	Work to build value (and increase income year over year)	Optimize enterprise value – shareholders and stakeholders
Time	Consumed	Freedom	Busy	Focused
Business Atmosphere	Chaos	Status quo	Structured improvement	Rapid change
Worry/Risk	Something happens to owner	Interruption in spinning off cash	Missing growth targets (losing clients and/or key staff)	M&A or stretch targets aren't hit
Money				
Money	Tight	Consistent	Building	Required to continue
Finance	Personal, friends and family	Personal/company debt	Company debt	Outside Investors
Budget	None	Personal only	One year view at best	Detailed and multi-year
Profitability	Minimal	Lifestyle driven	Steady improvement toward BIC	Driving to high profit
Valuation	Minimal	Low	Medium	High
People				
Family	Ignored	Priority	Partial focus	Paused
Operator	Founder	Founder(s)	Founders/Team	Mostly external team that includes investors, board, managing partners, etc.
Customer Relationships	Starting	Deep and static	Increasing	Evolving
Culture	Undefined	Lifestyle	Developing	Structured
Accountability	Inconsistent	Loose	Expected	Enforced
Sales/Marketing				
Sales Approach	Technically led	Principal led	Trying to implement	Sales led
Business Model	Sell anything people will pay for	Sell high margin opportunities	Standards and process	Repeatable and scalable
Source of New Business	Friends, friends, and neighbors	Referrals	Referrals and marketing	Disciplined marketing and vendors
Marketing Investment	Sporadic	Minimal	Growing	Significant
Future				
Growth	Elusive	Controlled	Planned	Strategic and focused
Timeline Until Transition	Long	Long	Medium	Short
M&A	Wishful thinking	Little interest	Opportunistic	Strategic plan
Change	Resist	Small changes	Want to improve towards BIC	Drive rapid and radical change
Scalability	None	Not a focus	Beginning to focus	Focal point
Planning	Limited	Tied to lifestyle	Consistent but limited accountability	Disciplined



Coaching Tip:
Use “look through the same lens” and “help us better align” metaphors to improve **Clarity, Alignment, and Velocity.**

Modes Theory: What's Available Today



Over 1,400 assessments completed.
Partner videos and assets available.

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Assessment Overview

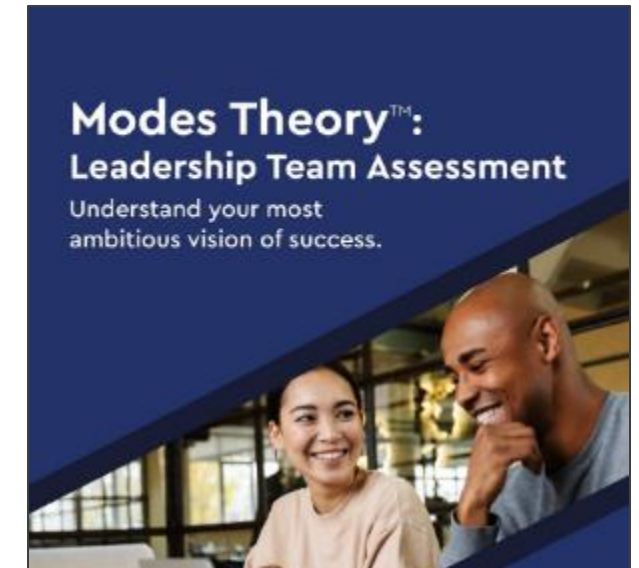
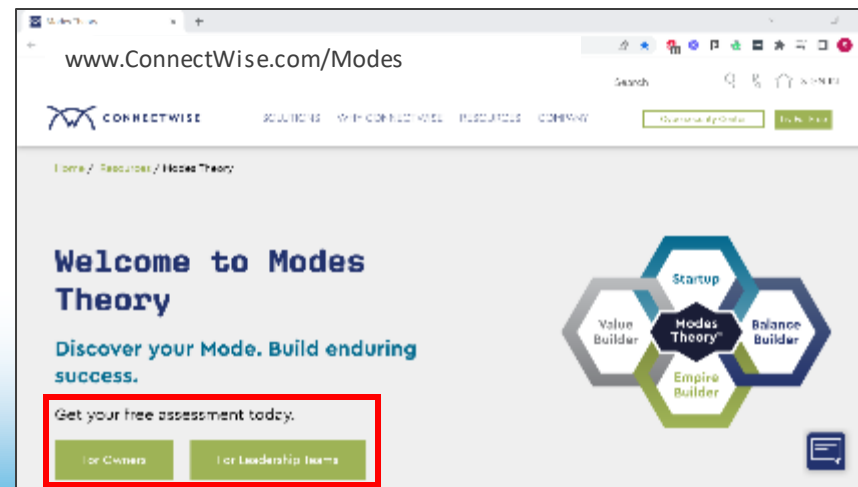
Your Results

1. Modes Mindset™
2. Modes Profile
3. OML Score
4. Assessment Answers

Next Steps: Where to Go from Here

Appendix

1. Modes Assessment Overview
2. Job Roles and Modes
3. Variations of Modes
4. Align Modes for Success: Scenarios and Discussion Questions
5. OML™ (Operational Maturity Level™) and Modes
6. Resources
7. About the Modes Theory Assessment



Modes Theory introduced at IT Nation
Evolve, Connect, Share and Secure.





Progress + performance

Attract + retain talent

Teams, roles + empathy

Culture + clarity

Customer satisfaction

Provide + scale services

Effective communications

Key habits + behaviors

Identify issues objectively

Connect with plans + strategies

**Are you rowing together?
Same lake, boat, team & stroke**

“We can all row. We can all show up and do some work. But where is your head at? I thought Modes was powerful.” – Partner

Sample Scenario - Discovering General Maturity: How do you measure success?

This scenario leads to: PSA, BrightGuage, RMM, Command, Services, Sell, SL Index, SLIQ, Evolve

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General Answer:
We need to improve our service delivery.

Any specific KPI or financial goal in mind?

We just always seem busy, and our clients are noticing.

No

100: We should talk about how our PSA makes tracking things easier or how our RMM tool can automate some of that work.
200: We could help you dial in measuring the right things to compare with what we see the best performing companies do. Build a dashboard and give you real-time visibility into key metrics.
300: If you're not sure of your Service Gross Margin it can lead to a cycle of business that is hard to overcome. Getting your service delivery pricing and costs right is a huge first step to making sure you can be staffed right.

Operational Answer:
Our tech utilization is high, but we are still falling behind.

What KPI and Target?

Utilization rate is at our goal of 75% but we're still losing ground and we can't hire right

General

Specific

100: Utilization can be tricky – we should talk about how what goes into your formula and see how it compares.
200: That utilization sounds reasonable. We should talk about automation and your pricing – those are two things that might explain what you're seeing.
300: We have another metric that might help - Service Multiple of Wages - and a few other metrics would help us determine if you might have a pricing issue, noisy clients or some challenges with how efficient your service team is.

Financial Answer:
We're busy but not profitable enough.

Specific and Reasonable?

Our Service Margins are just above 40% and we're just keeping our head above water.

Yes

No

100: Sound like you know the important numbers to manage. Let's get with one of our team that knows what might be the issue and how we can help.
200: If this is all services, we should talk about breaking down how you track things. Or is one area of service really underperforming?
300: We should look at your Service model and see what's different than what we see the best performing companies do.

I just know we're busy and should be making more money.

All: Mention benchmarking, BIC profitability and treat them like it was a General Answer

Partner Benefits from Modes & Maturity Alignment

- **Strengthen the Why** – Discussions reinforced the Why of the company and the owner.
- **Improve Perspective** – Leadership team better understood pressures of ownership which built shared empathy.
- **Plan for Exit** – Discussions of what happens when owner exits.
- **Understand Growth Strategies** – How to grow, plus how fast...and when.
- **Align on Gaps** – Identify where gaps exist within owners and teams. How to align effectively. Also, how to include all staff post-pandemic

PARTNER JOURNEYS & LESSONS LEARNED

Key Questions for Partners

	MODES MINDSET / CYBERSECURITY GROWTH JOURNEY			
	Startup	Balance Builder	Value Builder	Empire Builder
Maturity (Your organization)	Were/are you Basic, Mid, or High?	Were/are you Basic, Mid, or High?	Were/are you Basic, Mid, or High?	Were/are you Basic, Mid, or High?
Matching Offerings (With your vendors and with your clients.)	How did/are you select and build cybersecurity client offerings, expertise, and thought leadership?	How did/are you select and build cybersecurity client offerings, expertise, and thought leadership?	How did/are you select and build cybersecurity client offerings, expertise, and thought leadership?	How did/are you select and build cybersecurity client offerings, expertise, and thought leadership?
Key Questions (Select questions that apply and that you recall.)	How did/are you: <ul style="list-style-type: none"> - Clarify direction? - Align with team? - Set targets and metrics? - Determine key scoring? - Select tools and/or people? 	How did/are you: <ul style="list-style-type: none"> - Clarify direction? - Align with team? - Set targets and metrics? - Determine key scoring? - Select tools and/or people? 	How did/are you: <ul style="list-style-type: none"> - Clarify direction? - Align with team? - Set targets and metrics? - Determine key scoring? - Select tools and/or people? 	How did/are you: <ul style="list-style-type: none"> - Clarify direction? - Align with team? - Set targets and metrics? - Determine key scoring? - Select tools and/or people?

What is your cybersecurity journey and what has changed...and/or stayed the same over time?

Mike

- Firmly Value Builder following Balance Builder matchmaking in past.
- Transitioning to Empire Builder...maybe.

Tim

- Long-time Value Builder to Empire Builder now with NCT/PE, now as MSSP.
- Overall structure/setup has stayed the same.

How did knowing your Mode and defining your Maturity clarify your direction and team alignment?

Mike

- Previously stuck at \$100K MRR years ago.
- Mix of work, acquisitions, and metrics helped alignment.

Tim

- End in Mind thinking allowed for defined vision, small chunks, waypoints, and working backwards.
- New Charter involvement and resources enabled acceleration to vision.

What matters to your performance with cybersecurity metrics and when keeping score?

Mike

- “I have a problem.”
- Clear cadence with EOS Traction Dashboard. Still too much “Muscle and Feel.”
- Mature budget and dashboard. Now need departmental forecast and budgets.

Tim

- Transition in use of metrics from Value Builder to Empire Builder, and with MSSP.
- Relevant goals are key, with team members knowing how they contribute.
- Need to choose goals wisely and be careful with KPI sprawl.

When is it best to leverage cybersecurity tools and people outside your organization?

Mike

- My answer is always...and I have a story.
- Example: ConnectWise SOC, 2 x Techs, local consultants.
- Story of large cybersecurity incident recovery.

Tim

- A key to growth, with deliberate decisions to partner (ConnectWise, IP, other).
- Having clarity on Journey, Mode, and Score/KPIs helps drive partnering decision.
- The need/ability to say NO to things is important. “Relentless focus” is critical.

Q & A



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NEXT STEPS



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Don't forget to fill out your

SESSION SURVEY

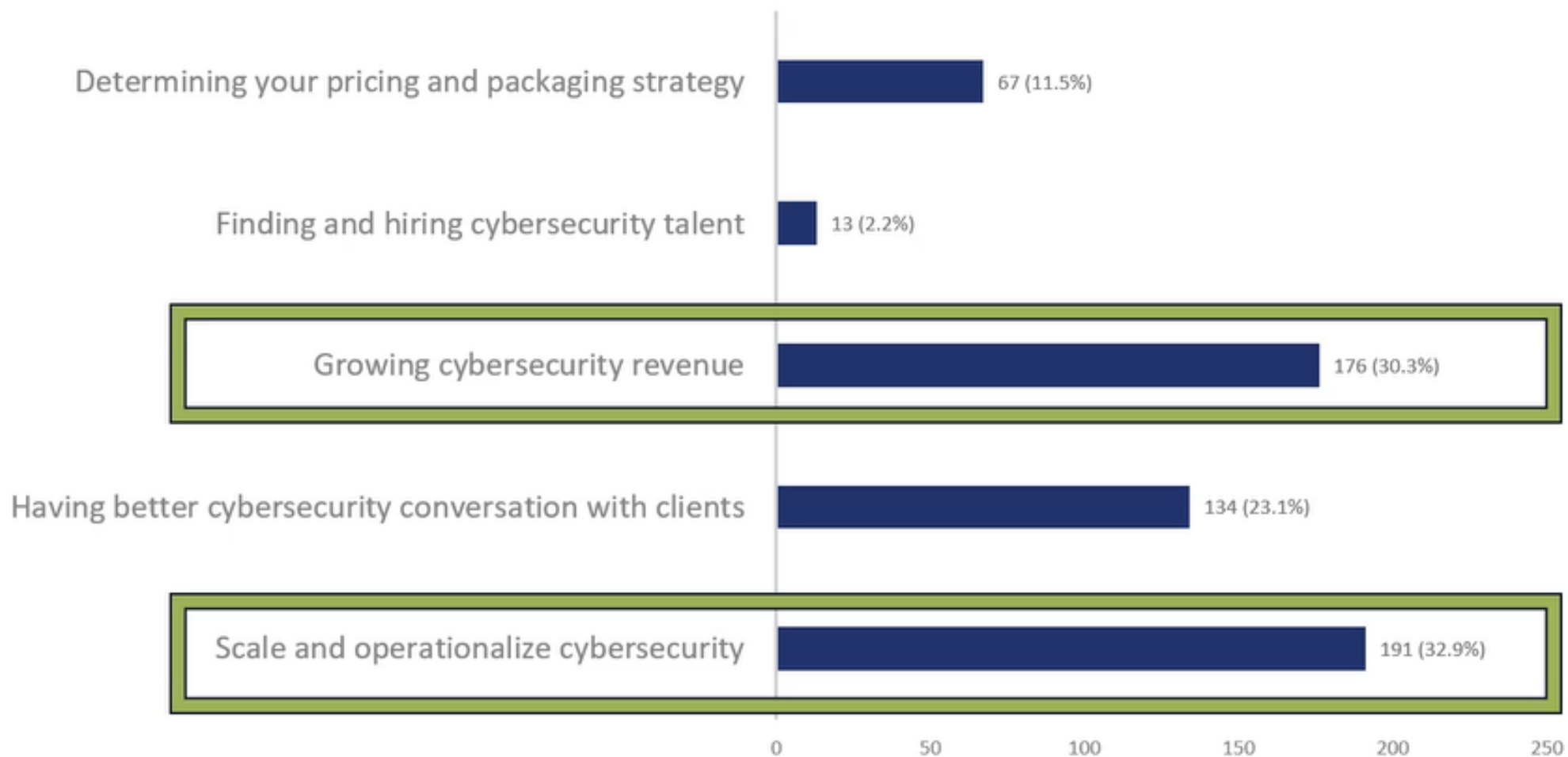
Additional Slides

5 Principal Insights: Business, Team, Life, and Growth

1. There is **no right or wrong Mode** or **defined progression** between Modes.
2. Modes **alignment discussions often lack consensus**, uncover misalignment, and require regular review.
3. Partners value **benchmarking against "best-in-mode"** partners to keep score and compare with owners in similar mindsets.
4. Partners often **move between Modes** during entrepreneurial changes and life events.
5. Partners believe that **their relationship with ConnectWise and other vendors can transform into partnerships** which use a common language.

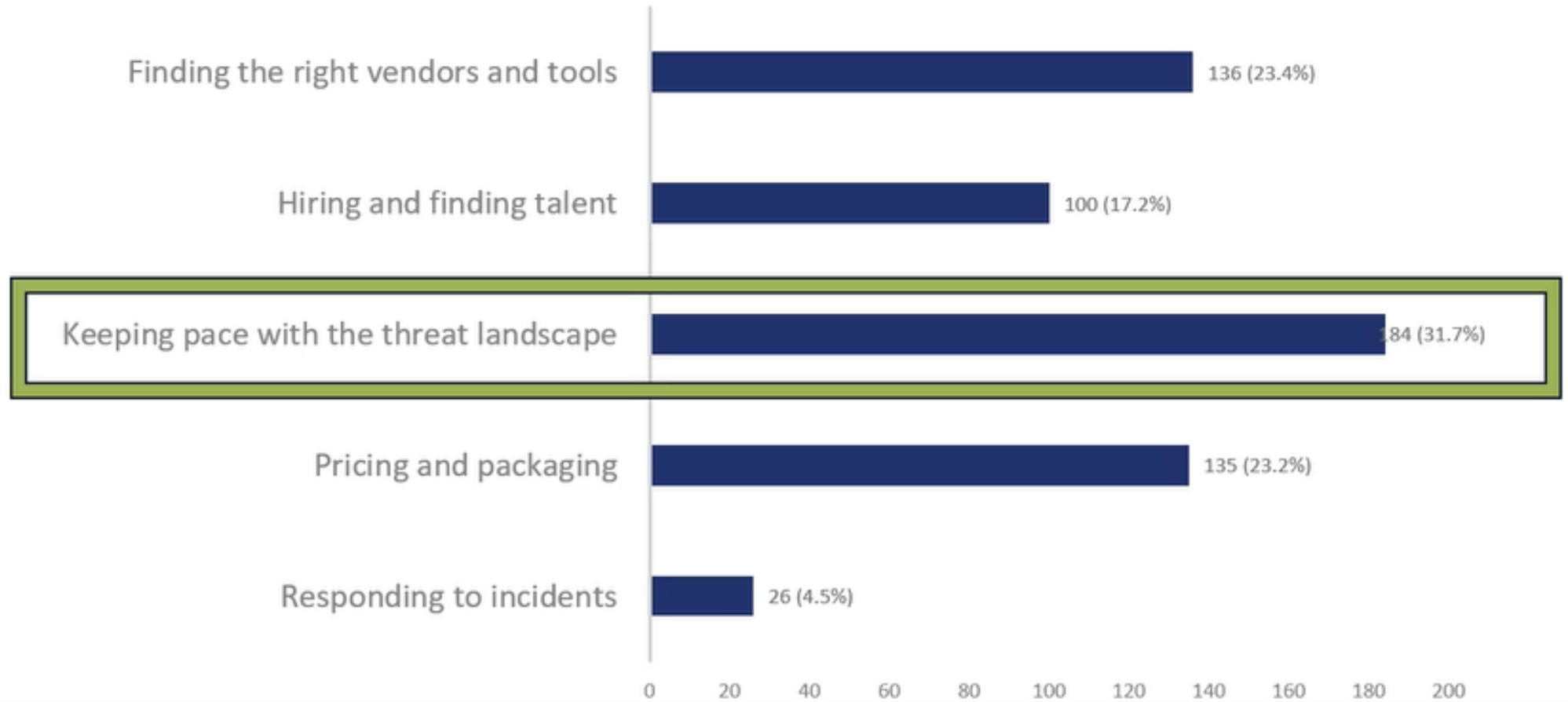
Priorities

TOP CYBERSECURITY PRIORITY FOR NEXT 12 MONTHS



Challenges

BIGGEST CYBERSECURITY CHALLENGE



MODES, MATURITY & MATCHMAKING

