Session Info:

Next-Level Business Models: Revolutionizing Managed Services with BLAST Zone Engineering and MSP+OS

Session Description:

We are proud to unveil MSP+ OS - the premier business framework designed for Managed Service Providers! Our pragmatic approach will accelerate growth, scalability, profitability, and enterprise value while reducing administrative overhead.

Attendees will discover how BLAST Zone Engineering can help Managed Service Providers create a superior security practice. We will delve into real-world tested plans and innovative strategies that transform your stack, your operating procedure and mindset.

By the end of the session, attendees will walk away with valuable insights and tools to help optimize existing business model in a rapidly-evolving industry.

IT NATION™ SECURE

hosted by CONNECTWISE®

Next Level Business Model: Revolutionizing Managed Services with BLAST Zone Engineering & MSP+OS

Presented by MSP+OS

Adam Bielanski – Sierra Pacific Group

Bill Stucklen – Stack Advisors

Mike Williams – Enterprise Value Partners (XPM2)

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Agenda

1. What is MSP+OS?
2. Advantages of MSP+OS
3. BLAST ZONE Engineering
4. Q & A

Mike Williams

Mike's journey exemplifies a visionary entrepreneur's roadmap to success in the IT sector.

- Co-founder & driving force behind Logically platform, startup to >$100M in revenue.
- Pioneer in merging MSP peer group members & spearheaded 14 successful integrations at Logically.
- Grew enterprise value from $8m in 2015, to $59.5m in 2018, to $250m+ currently.
- CEO of XPM2 Partners - Rebranding to Enterprise Value Partners
  - Delivering expert business consulting, platform building, and enterprise value creation.
  - 100+ post-acquisition integrations.
- Technical architect for Fortune 500 companies, one of Maine's first MCSEs, & former CIO of Maine's largest primary care practice.
- Wide experience EOS Integrator\Visionary & Facilitator, CFO, COO, CSO
- Advisor or Shareholder: Logically, ConnectWise, Intel, Forza Corp (MSP channel marketing), Delta Vida (CW admin & tech stack consolidation)

EVP ENTERPRISE VALUE PARTNERS

Bill Stucklen

Bill's professional journey demonstrates the transformative power of technology, collaboration, and automation in the IT sector.

- Began his IT career in the early 90s, honing his skills in power computing and providing technical support for the video game Doom.
- Witnessed major industry developments, including the .com bubble, T&M IT support, and the inception of managed services over the past 35 years.
- Influenced the formation of ConnectWise software when his NYC-based MSP purchased it in 2005.
- Co-founded Stack Advisors in 2011, an automation consultancy focused on the ConnectWise Business Suite, facilitating MSPs to cultivate and automate their processes.
- Committed to giving back to the MSP community that helped him build and successfully exit his MSP.
- Assembled a highly skilled team and established standards for MSPs, leading Stack Advisors in fostering a culture of automation, education, and expertise to empower individuals and organizations to thrive.

STACK
ADVISORS

Adam Bielanski

Adam‘s journey illustrates the impact of visionary leadership and strategic process automation in shaping the tech industry.

- An electrifying entrepreneur and public speaker known for cultivating exceptional technology business leaders.
- Expert in automating processes for predictable outcomes, blending philanthropy and community values into his professional life.
- Successfully bought and sold multiple tech businesses before age 30, leading to his consulting career in 2012.
- Leveraging his tech business ownership experience and a results-oriented mindset, founded Sierra Pacific Group in 2012, a pioneering consulting agency propelling tech leaders to new heights.
- Sierra Pacific Group, under Adam's leadership, has become a top-rated destination in the technology industry, consistently upholding its core values and teammates.
- Actively contributes to the ConnectWise Advisory Council and the Entrepreneurs' Organization of San Diego, showcasing his far-reaching influence in the tech industry.

Sierra Pacific Group

A Roadmap for Managed Service Providers Seeking Sustainable Growth

Unleash the Potential: Discover untapped avenues for expansion and profitability in your MSP business.

Ignite Growth: Implement a culture of continuous improvement, driving your MSP towards unparalleled success.

Deliver Value: Enhance customer experience, fostering long-term loyalty and sustainable business growth.

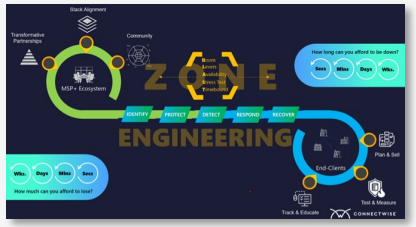
SCAN HERE

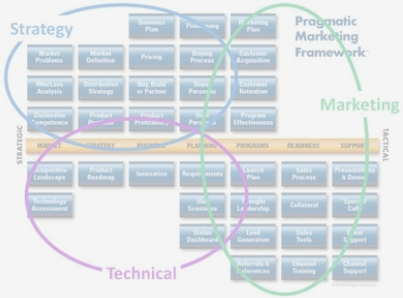
Drive Innovation: Stay ahead in the evolving IT landscape by embracing change and pioneering solutions.

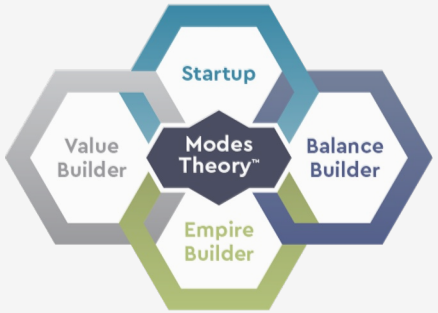
Secure Your Future: Build a resilient MSP business by mitigating risks and preparing for tomorrow's challenges.

Origin Story

CompTIA Cybersecurity Trustmark



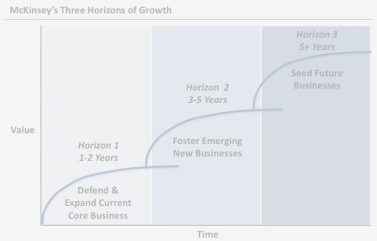




Strategyzer

MSP+OS

EOS



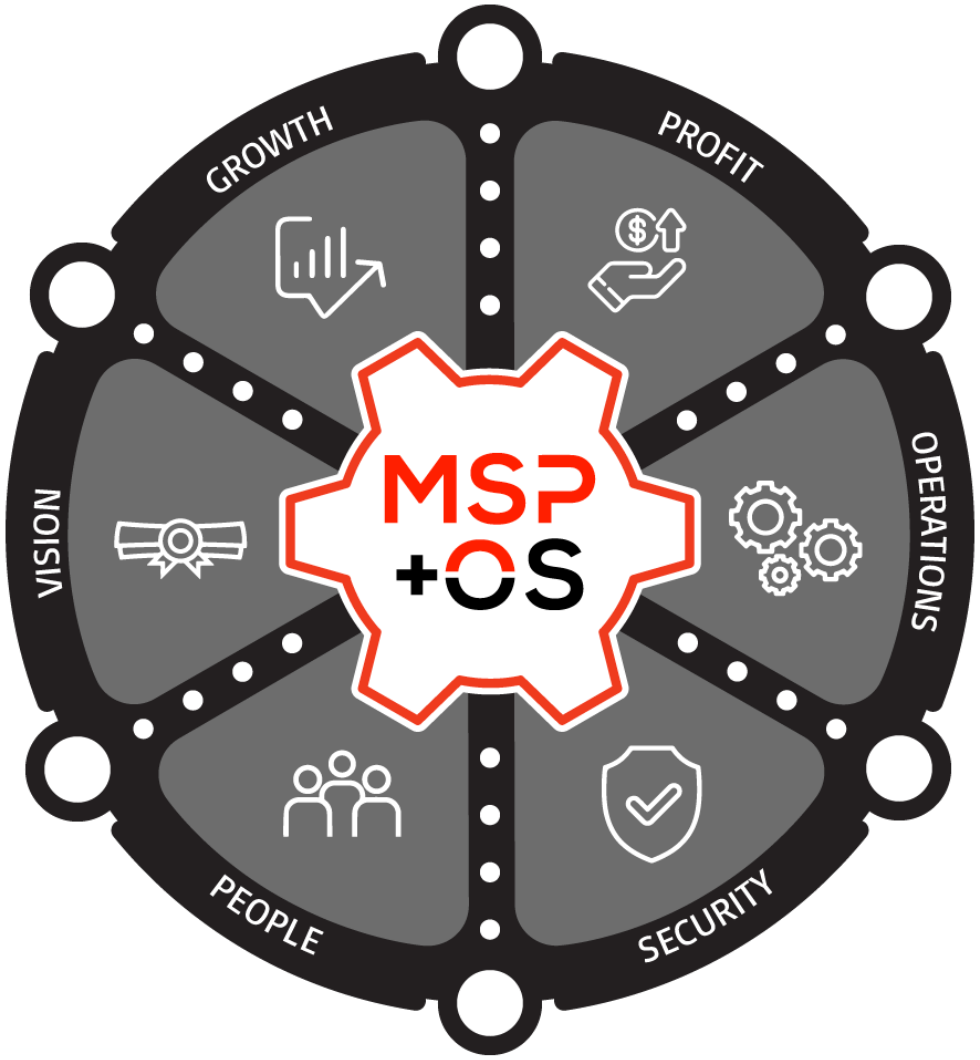
MSP+OS - Next Level Business Framework

- Curated by Industry Leaders with $100m+ Platform Experience
- MSP Focused Design
- Security & Trust Centric
- Streamlines and Benchmark Based
- Prioritize, Focus, and Act
- Comprehensive Approach for Enterprise Value
- Proven Strategies for Vision, Growth, Scalability, Security, and Profit
- Network of Best-in-Class MSP Vendors
- Go-givers Driven by Your Success

MSP+OS Drivers

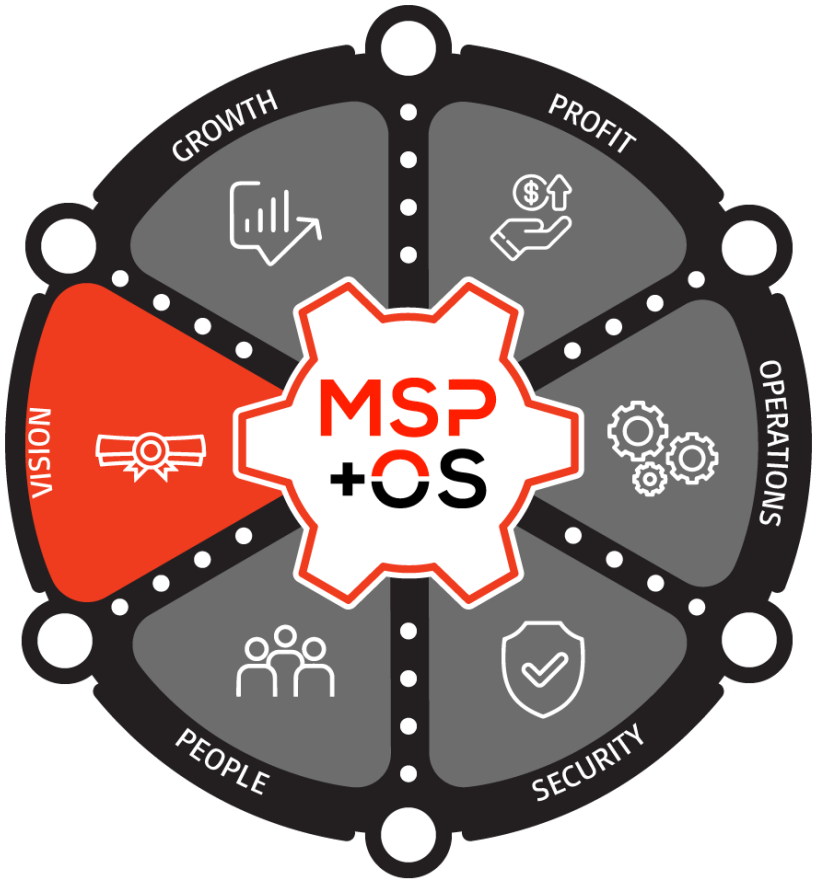
Key MSP Drivers

- Vision
- People
- Growth
- Profit
- Operations
- Security



MSP+OS Vision Driver

- Vision, Core Values, and Core Business
- Big, Hairy, Audacious Goal (BHAG) Accountability and Right Seats
- Open Leadership and Goal Orientation
- Regular Meeting Pulse and Effective Meetings
- Long-Term Problem Solving, Core Processes, and Scorecards



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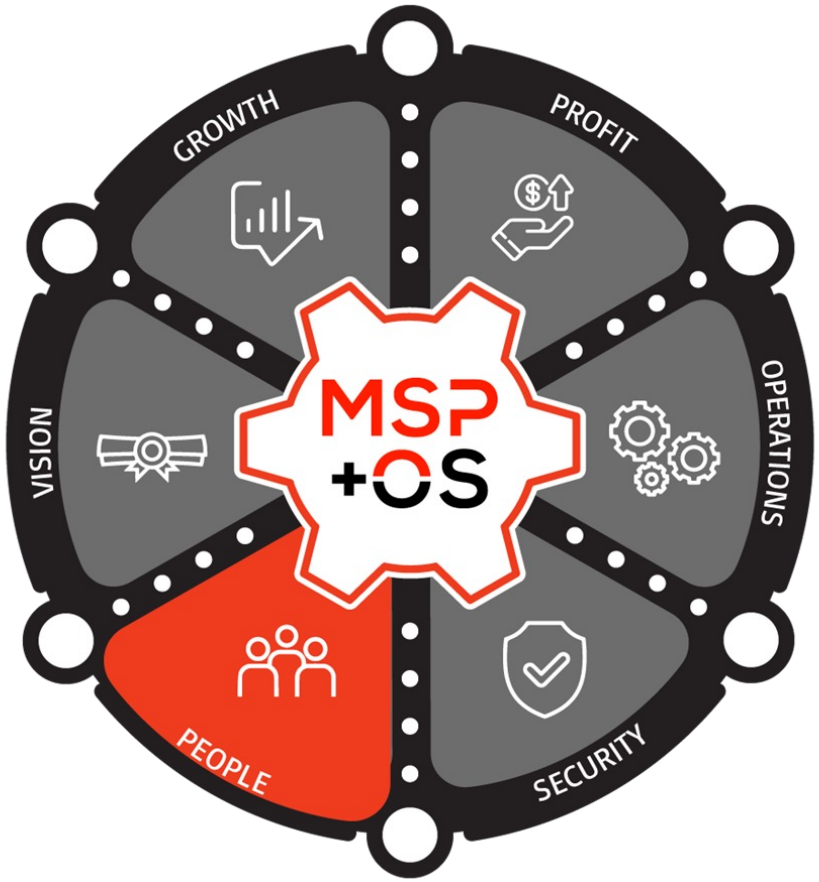
MSP+OS People Driver

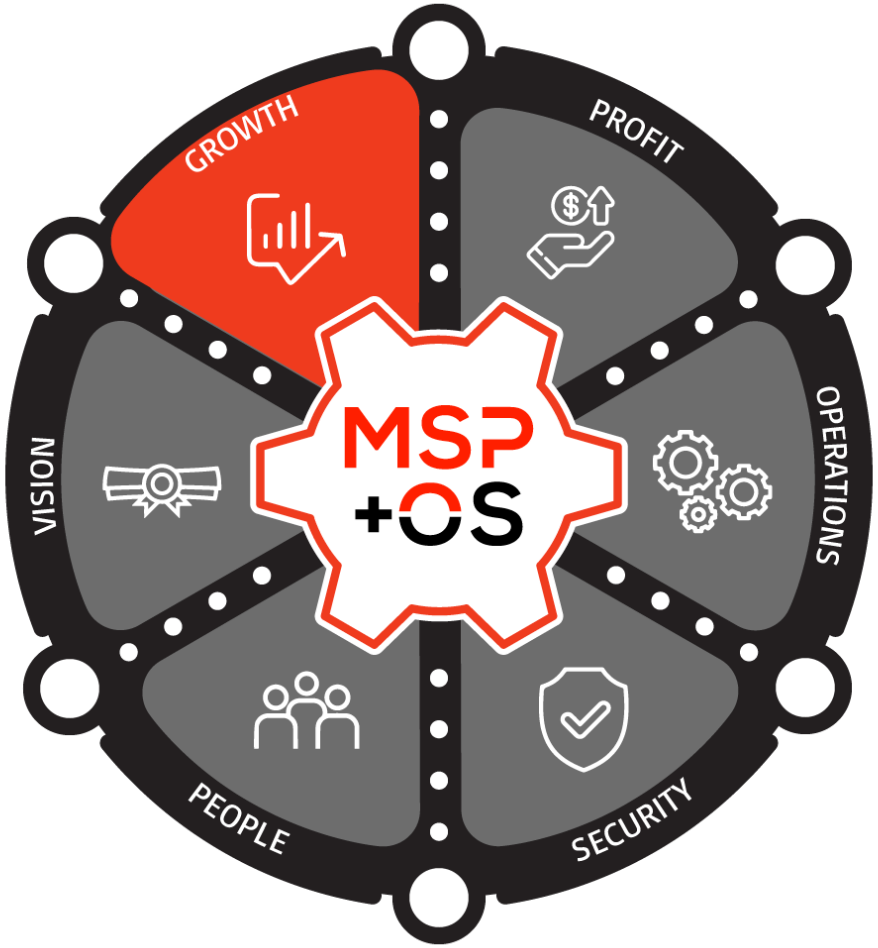
- Service Company – People Most Important Asset
- Lose Trust = Staff Attrition & Employee Churn
- Cultural Assessment
- Strategic Org Structure, Job Descriptions & Compensation Reviews
- Employee Engagement
- Talent Aquisition, Development, and Retention Strategies



ENTERPRISE VALUE PARTNERS

MSP+OS Growth Driver

- Clear Focus on “Ideal Client”
- Communicated Brand Promises
- Well-Defined Offerings
- Demonstrated Business Process
- Feedback Loops
- Delivery through Seamless Onboarding



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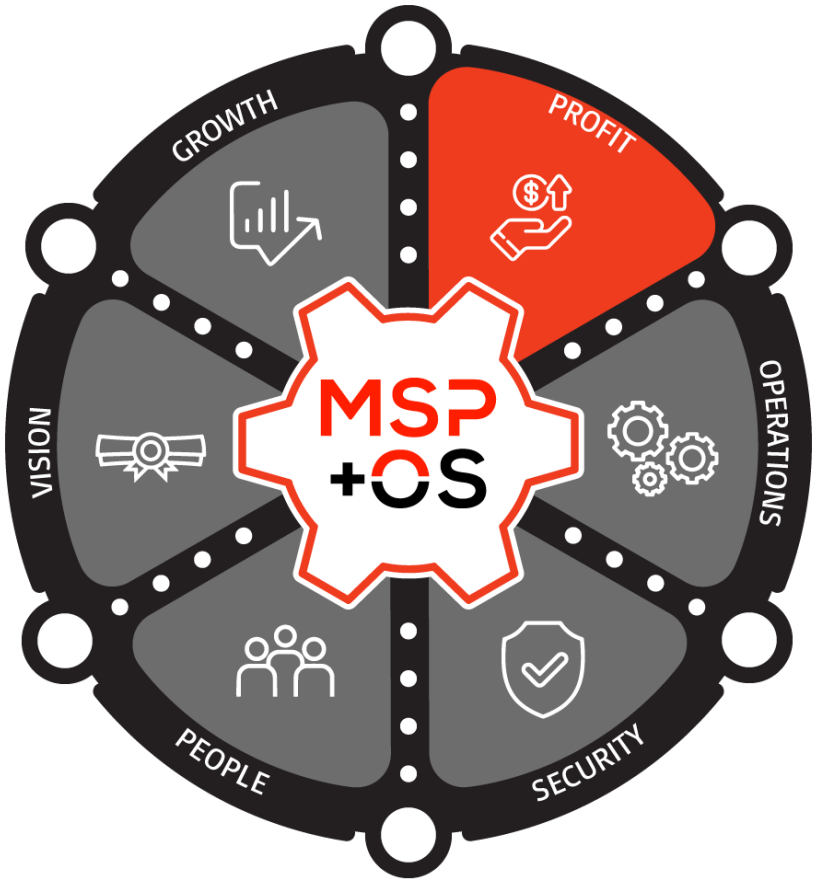
MSP+OS Profit Driver

Transformation for Profit

- **Maximize Revenue Opportunities**: Identify every possible revenue stream, ensuring your business capitalizes on all opportunities.
- **Measure Costs**: Keep costs and expenses as low as possible through efficient strategies and streamlined processes.
- **Innovative Techniques**: Employ the latest techniques (SLI) and best proven strategies to bolster your bottom line.
- **Profit-Generating Transformation**: Financial COA Projects to Align to SLI



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MSP+OS Operations Driver

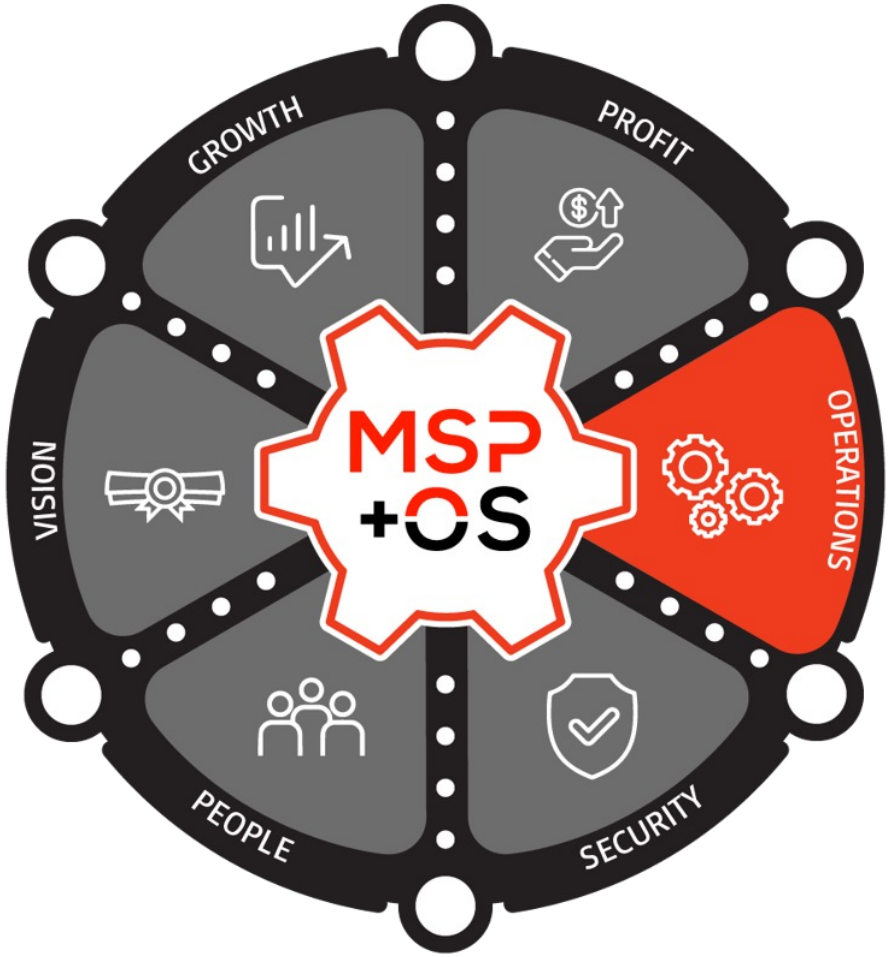
Define and Automate Your SOPs

Track Environmental Changes

Dedicated, Collaborative Planning

Manage Data from "Endpoint to Invoice”

Leverage Tools AND Automation



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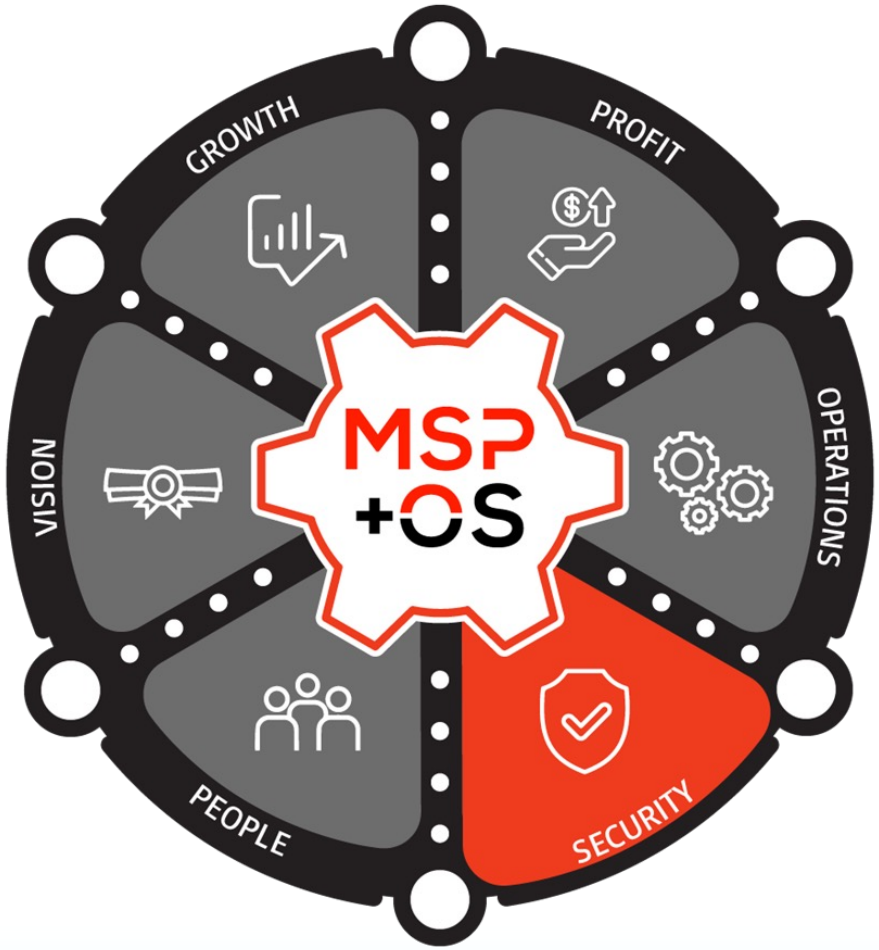
MSP+OS Security Driver

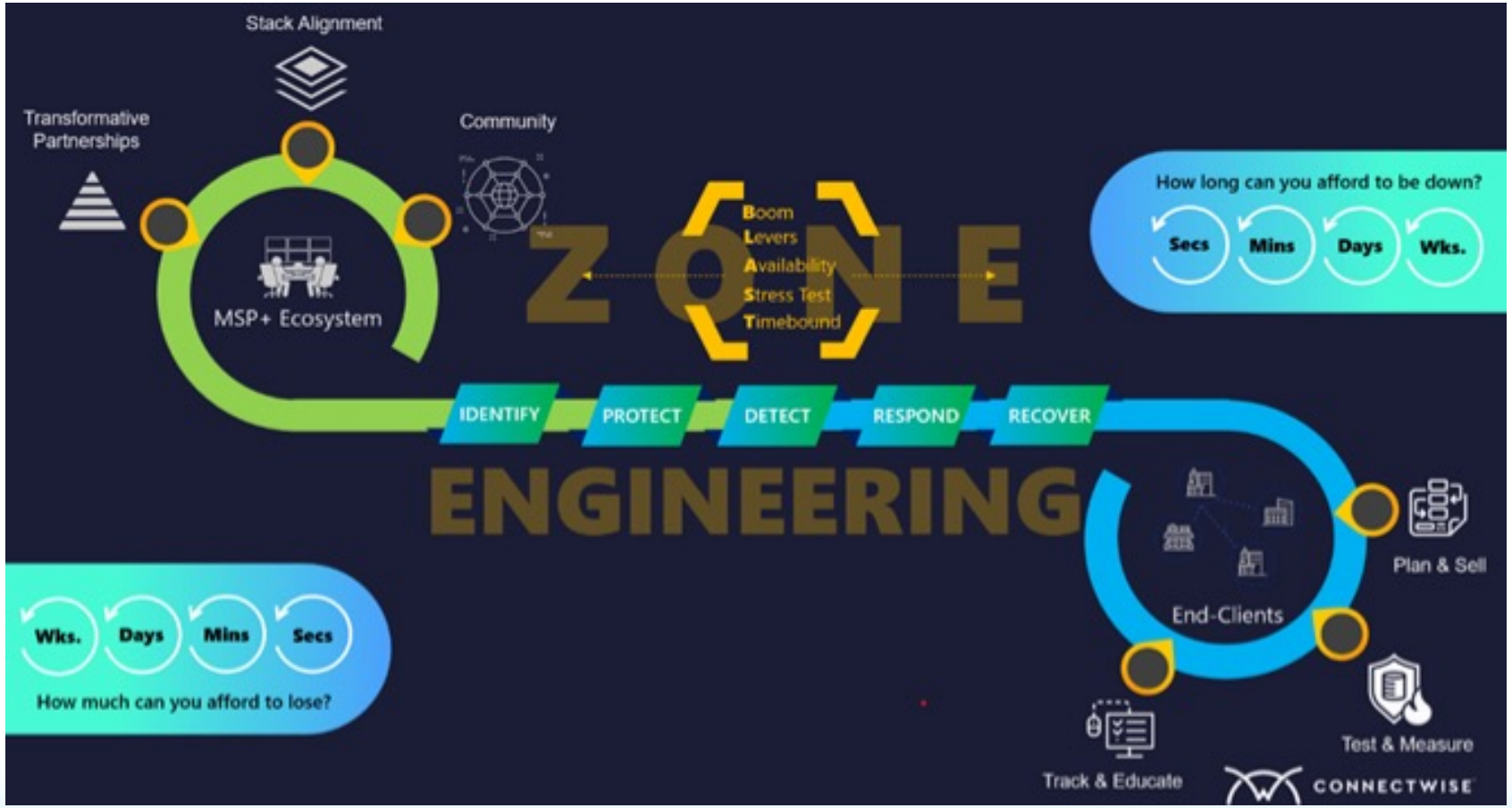
- Ever Increasing Importance to Protect Your Business & Clients – Evolving Since 2010's
- Guidance to Navigate the Flood of Tools
- Focus on Best Security Stack for Spend
- Understand Budgetary Constraints
- Example – Franchise Risk Assessment



Translating BLAST Zone Engineering

- Our MSPs and Customers are under ever increasing Attacks = Blasts
- "BLAST Zone Engineering" = Practice of designing and constructing structures or systems to withstand the effects of explosions or blasts
- Goal to protect assets, ensuring safety, and minimize damage
- Technical and administrative safeguards to mitigate the destructive forces
    - Not prevent – there will be breaches
    - Not just tools to protect the perimeter and end points
    - Limit the damage to data and productivity = Business Outcomes

BLAST Zone Engineering

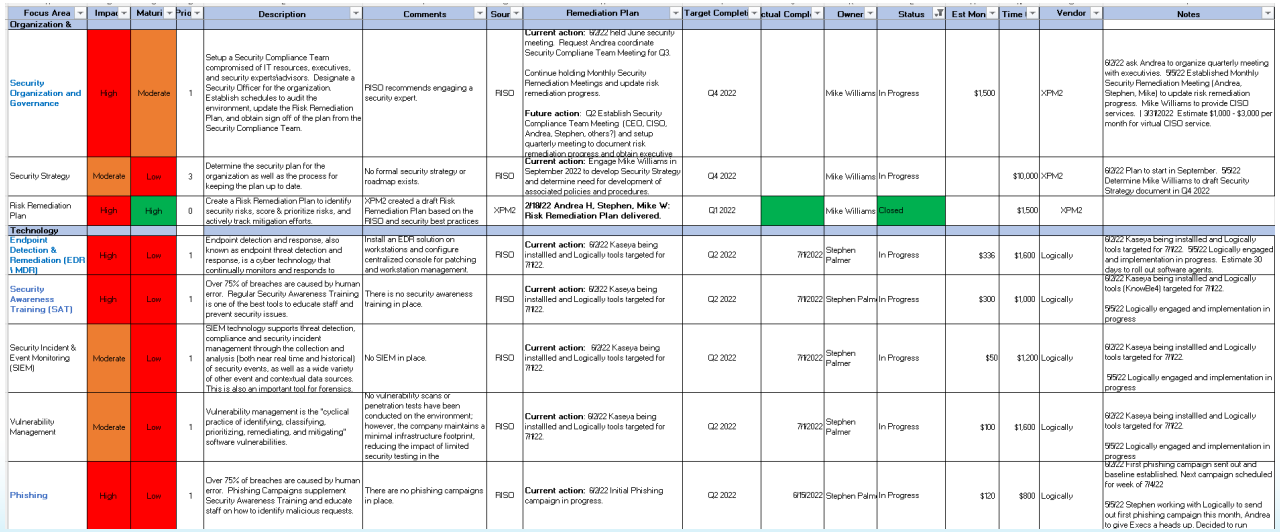


Strategy to Transform Your Security Stack

- Which Tools Should be in my Stack?
- Limited Budgets
- BLAST Zone = Solutions in Each Area = Minimize Damage
- MSP+OS Security Assessment
  - Identify Gaps
  - Balance Investments
  - Improve ROI

MSP+OS Risk Remediation Plan

- Security Assessment Output = Risk Remediation Plan
- Clean Up In-House Security & Improve Offering to Customers
  - Re-Use our Templates to Manage Customer Risk
  - Based on Regulated Industry Best Practices



Focus Area	Impac	Maturi	Prio	Description	Comments	Sour	Remediation Plan	Target Completi	ctual Compl	Owner	Status	Est Mon	Time	Vendor	Notes
Organization &															
Security Organization and Governance	High	Moderate	1	Setup a Security Compliance Team compromised of IT resources, executives, and security experts/advisors. Designate a Security Officer for the organization. Establish schedules to audit the environment, update the Risk Remediation Plan, and obtain sign off of the plan from the Security Compliance Team.	RISO recommends engaging a security expert.	RISO	**Current action:** 6/2/22 Held June security meeting. Request Andrea coordinate Security Compliance Team Meeting for Q3. Continue holding Monthly Security Remediation Meetings and update risk remediation progress. **Future action:** Q2 Establish Security Compliance Team Meeting (CEO, CISO, Andrea, Stephen, others?) and setup quarterly meeting to document risk remediation progress and obtain executive	Q4 2022		Mike Williams	In Progress	$1,500		XPM2	6/3/22 ask Andrea to organize quarterly meeting with executives. 9/5/22 Established Monthly Security Remediation Meeting (Andrea, Stephen, Mike) to update risk remediation progress. Mike Williams to provide CISO services. (9/7/2022 Estimate $1,000 - $3,000 per month for virtual CISO service.
Security Strategy	Moderate	Low	3	Determine the security plan for the organization as well as the process for keeping the plan up to date.	No formal security strategy or roadmap exists.	RISO	**Current action:** Engage Mike Williams in September 2022 to develop Security Strategy and determine need for development of associated policies and procedures.	Q4 2022		Mike Williams	In Progress		$10,000	XPM2	6/3/22 Plan to start in September. 9/5/22 Determine Mike Williams to draft Security Strategy document in Q4 2022.
Risk Remediation Plan	High	High	0	Create a Risk Remediation Plan to identify security risks, score & prioritize risks, and actively track mitigation efforts.	XPM2 created a draft Risk Remediation Plan based on the RISO and security best practices	XPM2	**2/18/22 Andrea H, Stephen, Mike W: Risk Remediation Plan delivered.**	Q1 2022		Mike Williams	Closed		$1,500	XPM2	
Technology															
Endpoint Detection & Remediation (EDR \ MDR)	High	Low	1	Endpoint detection and response, also known as endpoint threat detection and response, is a cyber technology that continually monitors and responds to	Install an EDR solution on workstations and configure centralized console for patching and workstation management.	RISO	**Current action:** 6/2/22 Kaseya being installed and Logically tools targeted for 7/1/22.	Q2 2022	7/1/2022	Stephen Palmer	In Progress	$336	$1,600	Logically	6/3/22 Kaseya being installed and Logically tools targeted for 7/1/22. 9/5/22 Logically engaged and implementation in progress. Estimate 30 days to roll out software agents.
Security Awareness Training (SAT)	High	Low	1	Over 75% of breaches are caused by human error. Regular Security Awareness Training is one of the best tools to educate staff and prevent security issues.	There is no security awareness training in place.	RISO	**Current action:** 6/3/22 Kaseya being installed and Logically tools targeted for 7/1/22.	Q2 2022	7/1/2022	Stephen Palmer	In Progress	$300	$1,000	Logically	6/2/22 Kaseya being installed and Logically tools (KnowBe4) targeted for 7/1/22. 9/5/22 Logically engaged and implementation in progress
Security Incident & Event Monitoring (SIEM)	Moderate	Low	1	SIEM technology supports threat detection, compliance and security incident management through the collection and analysis (both near real time and historical) of security events, as well as a wide variety of other event and contextual data sources. This is also an important tool for forensics.	No SIEM in place.	RISO	**Current action:** 6/2/22 Kaseya being installed and Logically tools targeted for 7/1/22.	Q2 2022	7/1/2022	Stephen Palmer	In Progress	$50	$1,200	Logically	6/3/22 Kaseya being installed and Logically tools targeted for 7/1/22. 9/5/22 Logically engaged and implementation in progress
Vulnerability Management	Moderate	Low	1	Vulnerability management is the "cyclical practice of identifying, classifying, prioritizing, remediating, and mitigating" software vulnerabilities.	No vulnerability scans or penetration tests have been conducted on the environment; however, the company maintains a minimal infrastructure footprint, reducing the impact of limited security testing in the	RISO	**Current action:** 6/3/22 Kaseya being installed and Logically tools targeted for 7/1/22.	Q2 2022	7/1/2022	Stephen Palmer	In Progress	$100	$1,600	Logically	6/3/22 Kaseya being installed and Logically tools targeted for 7/1/22. 9/5/22 Logically engaged and implementation in progress
Phishing	High	Low	1	Over 75% of breaches are caused by human error. Phishing Campaigns supplement Security Awareness Training and educate staff on how to identify malicious requests.	There are no phishing campaigns in place.	RISO	**Current action:** 6/3/22 Initial Phishing campaign in progress.	Q2 2022	6/15/2022	Stephen Palmer	In Progress	$120	$800	Logically	6/3/22 First phishing campaign sent out and baseline established. Next campaign scheduled for week of 7/4/22 9/5/22 Stephen working with Logically to send out first phishing campaign this month. Andrea to give Execs a heads up. Decided to run

Recap

- MSP+OS Next Level Framework
  - Revolutionize your Business <Value Prop>
- BLAST Zone Engineering & MSP+OS Security Driver
  - Security Assessment
  - Risk Remediation Plan
- Tools
  - MSP+OS Assessments
  - Modes Theory
  - OML
  - SLI
- Presentation and Links to Tools: mspplusos.com\ITNSecure2023
- <Call to Action>

Q & A

Let’s get to know one another and get some value out of this session!

Call to Action

- Check us out on mspplusos.com
- Go get my book and leave a review! QR Code

Don't forget to fill out your

SESSION SURVEY