Maximizing Efficiency with Nerdio and Beyond:

How Automation Elevated Managed Services IT's Service Quality and Client Satisfaction

Overview

Managed Services IT (MSIT), a trusted technology advisor based in Philadelphia, has served clients across all industries since 2008. With remote work becoming more prevalent, MSIT innovated a new cloud service delivery model to cater to their clients' needs. Offering a comprehensive suite of services doesn't come without its challenges, including repetitive processes, weekend work for technicians, and ensuring accuracy in user onboarding processes. President Jim Brennan decided to automate MSIT's processes using Rewst to tackle these challenges. This case study highlights the challenges MSIT encountered, the reasons for selecting Rewst, and the concrete benefits automation has brought to their operations.

Manual tasks result in inconsistencies, delays, and after-hours work

In the rapidly changing world of MSPs, MSIT pioneers advanced Desktop as a Service (DaaS) cloud hosting and support. Nerdio, the backbone of this operation, enables consolidating client services onto a single platform.

While the Nerdio image maintenance process has been beneficial, it has also been a double-edged sword. It is time-consuming, leading to technicians working overtime, resulting in inconsistencies, delays, and declining client satisfaction.

Another primary concern has been the accuracy of onboarding and offboarding users. Clients have questioned why they are still paying for extra licenses for users who are no longer active or why newly onboarded users are missing essential components such as group access or calendars.

These issues have pointed to a need for greater uniformity and consistency in MSIT's processes. Clients expect a smooth and standardized onboarding and offboarding experience, but manual processes have resulted in errors, billing inaccuracies, and inconsistencies in service delivery. To address these challenges, MSIT set out on a quest for improvement.

Rewst's integrations and community offer a more sustainable approach

Gabriel Herrera, *Information Technology Engineer*, set out to transform MSIT's desktop imaging from a manual, time-consuming task to an efficient, automated process. He initially used PowerShell scripts in Azure to automate functions like software installations and system configurations. While this helped reduce some of the team's workload, it also produced a potential bottleneck as Gabriel was the only person with expertise in PowerShell.

> ## "Without Rewst, I'd be handling support, maintenance, and troubleshooting myself, creating a bottleneck."

Gabriel Herrera, *Information Technology Engineer*
Managed Services IT

In search of a more sustainable approach, Jim discovered Rewst through Pax8. Rewst provided a comprehensive automation platform with dedicated support and a library of pre-built integrations that it maintains, reducing MSIT's reliance on any single person's expertise.

Rewst seamlessly integrated with MSIT's existing tools, such as IT Glue, Azure, CSP, Exchange Online, Graph, Nerdio, Pax8, ProofPoint, and SentinelOne, ensuring a smooth transition. At the same time, Rewst's workflow canvas and form builder would give the MSP the flexibility to automate any desired process.

Beyond Rewst's scalability, Jim and Gabriel also saw the benefit of the community engagement available, mainly through Rewst's Discord channel. It gave them access to immediate support and shared insights from engineers and fellow MSPs, fostering a collaborative learning environment.

Jim and Gabriel concluded that Rewst offered the best power, flexibility, and support, making it the ideal solution for MSIT's automation needs and enabling scalable operations. Their engagement with Rewst demonstrated a commitment to leveraging technology to streamline processes and enhance their technicians' work-life balance, aligning with their broader vision for the company.

> *"Rewst is the Cadillac of automation platforms. In the right hands, it is an incredibly powerful tool.*
> *- Gabriel Herrera, Information Technology Engineer*

Automation increases efficiency, consistency, and customer satisfaction

Rewst has markedly enhanced the operational efficiency within MSIT. Automating complex processes and addressing critical challenges, particularly in desktop image maintenance, user onboarding, and client task automation. MSIT is streamlining its operations with the assistance of Rewst.

Gabriel stressed the transformative impact of automating the previously manual and time-consuming tasks of maintaining desktop images and re-imaging hosts through the Nerdio workflow. This automation reduced the processing time from an entire day to just 35-40 minutes, significantly increasing job satisfaction by allowing technicians to focus on more valuable tasks. The Nerdio workflow, designed with meticulous care, ensures reliability. It includes sub-workflows for specific functions like managing machine power states and sending error notifications, thus minimizing possible mistakes.

Beyond image maintenance, Rewst has significantly enhanced MSIT's user onboarding process. Previously, customizing workflows for different client needs was a challenge that took up to two hours. Thanks to Rewst's integration with platforms like Nerdio, Microsoft, Autotask PSA, Datto, SharePoint, Proofpoint, and Bitdefender, this process has been reduced to under 10 minutes.

This efficiency is not just about saving time; it extends to license tracking, user provisioning, payroll, and HR reporting, thereby enhancing customer service through faster ticket resolution.

Furthermore, Rewst's automation solutions have been a boon for MSIT's clients, offering significant time and resource savings. A notable example is data entry automation from PDF forms for a medical company, which has freed thousands of nurses from tedious manual work. This automation not only represents a substantial cost saving but also marks a considerable improvement in operational efficiency. By shifting focus to providing automation as a service, MSIT has improved customer satisfaction and expanded its service offerings. This strategic move has opened up new revenue streams and has been instrumental in strengthening client relationships.

"The nurses have to fill out a manual PDF form, enter it line by line into a computer, print, scan, and fax it, wasting hours at their desks. Automating this process frees up thousands of nurses' time and saves the company money."
– **Gabriel Herrera,** *Information Technology Engineer*

MSIT's collaboration with Rewst has transformed its operational processes and client service delivery by leveraging advanced integration and automation capabilities. This strategic partnership underscores the value of automation in addressing complex IT challenges, streamlining workflows, and delivering tangible business benefits.

Value of versatility

Rewst has proven to be an invaluable tool for MSIT by offering capabilities beyond its advertised function as an automation tool for MSPs. MSIT has used Rewst as a data pipeline to facilitate integration, data transformation, and database loading, adding significant value. This versatility has set Rewst apart from other potential solutions, such as PowerShell, offering superior speed, ease of use, and documentation support.

Furthermore, its seamless integration with other systems, such as Graph API and Power Automate, reinforces its value proposition. Rewst has saved time and effort and improved productivity and accuracy, as evidenced by client feedback on the onboarding process and billing accuracy. Rewst has become an indispensable tool for MSIT, offering a comprehensive solution for data management needs, delivering efficiency and ease of use.

"We turned an MSP automation tool into a data pipeline, adding value by integrating APIs and transforming data."
- **Gabriel Herrera,** *Information Technology Engineer*

At MSIT, Jim and Gabriel have prioritized fostering a culture of automation, actively promoting its integration into daily operations. Initially skeptical, team members have become more open to automation as they see its benefits. Security personnel and the accounting department have started asking about automation processes and looking for ways to streamline their tasks and save time. Other MSPs have contacted Jim and Gabriel for advice on implementing automation strategies after seeing the positive impact at MSIT. This move toward automation is empowering for the team and vital for the industry's future, enabling technicians to focus on more complex tasks rather than time-consuming, repetitive manual processes.

Results

- **Efficiency and time saved:**
  Automation significantly reduces the time to complete tasks. For instance, what previously took 90 minutes to create a user now only takes 32 seconds. Automation also reduces maintenance tasks for cloud services like Nerdio from 6-7 hours to just one hour.

- **Financial impact:**
  Automation brings substantial financial savings. These significant savings allow for the reallocation of resources towards raises, better benefits, and the hiring of more highly skilled technicians.

- **Job satisfaction and ticket reduction:**
  Automation boosts job satisfaction by removing tedious manual tasks, especially those that often need attention during off-hours. It automates around 40% of IT tickets, including onboarding and password resets, easing the workload on technicians. This enables newly hired technicians to immediately train on more critical tasks instead of manual ones.

- **Client satisfaction:**
  Automation allows clients to enjoy quicker response times and more efficient resolution of their IT issues. This minimizes downtime and shows a proactive stance in managing their IT needs.

The Future is Limitless

MSIT is ambitiously designing the future of automation. Jim has an extensive plan to develop a state-of-the-art cost estimator workflow for Nerdio using Rewst. This innovative tool will allow clients to easily enter their cloud environment requirements and receive accurate cost estimates. Jim's vision extends to the automatic creation of entire cloud environments based on these estimates, which includes the auto-provisioning of hosts, generating user accounts and passwords, and efficiently organizing information in IT Glue. They expect the workflow to save an estimated 50-80 hours per cloud migration.

In parallel, Jim and Gabriel are developing automation strategies at MSIT to improve operational efficiency, reduce manual work, and enhance client satisfaction. Their plan includes automating onboarding and offboarding procedures, revolutionizing billing processes, and integrating Autotask for automated ticket handling and triage. These efforts will simplify operations and reduce manual interventions, allowing technicians to focus on valuable tasks for enhanced service delivery.

By strategically using Rewst with other tools in its stack, Jim is not merely aiming to transform his company; he's on a mission to reshape the industry's approach to service delivery, resource management, and customer satisfaction. Jim's dedicated team at MSIT is backing his pioneering initiatives, which are set to drive his company into a future led by innovation and followed by excellence.

> **"My vision is to use Rewst to extend Nerdio's Cost Estimator with a fully automated buildout of the cloud environment based on the provided specs. This workflow will not only save massive time—upwards of 50-80 hours per migration— but improve our gross margins and ability to win new clients."**

Jim Brennan, *President at Managed Services IT*

Are you ready to connect your tools and unlock greater efficiency, consistency, and client satisfaction?

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