

Case Study

Marcus Networking saves **\$120k+** and strengthens client trust with automated billing reconciliation, other workflows

Overview

Established in 2002, Marcus Networking is a family-owned business providing innovative technology and telecommunications solutions to businesses throughout the United States and Canada. After years of struggling with manual billing reconciliation, CEO Eric Marcus embarked upon an ambitious automation journey. This case study delves into how the MSP used Rewst to build an automated, real-time billing reconciliation process and several other workflows that are saving substantial time and money while strengthening trust with clients.



Manual reporting drains MSP's resources

Over the course of its 20+ year history, Marcus Networking has acquired various tools to support its clients, including *Autotask, Datto RMM, IT Glue, Microsoft 365, Pax8, Proofpoint, and SentinelOne*. As the company expanded its tech stack, the nuances—and complexity—of manual billing reconciliation grew with it.

Eric Marcus, the founder and CEO of Marcus Networking, expressed this challenge: "For every product the customer uses, somebody manually reviewed each vendor bill and then cross-referenced it with the customer contract to bill the customer accurately each month. That was taking about 20 to 40 admin hours each month. And the data could change the very next day."

To address this challenge, Eric sought a solution that could automate Marcus Networking's billing reconciliation process and eliminate the need for manual updates to customer contracts. He knew his company required a platform that seamlessly integrates with their existing tools, providing a user-friendly workflow to manage billing complexities efficiently.

Rewst's integrations and team set the stage for success

Eric discovered Rewst at a tradeshow in 2023. What drew him initially to Rewst was its extensive pre-built integrations and the team behind the platform. Eric also appreciated Rewst's ability to manipulate and manage data from third-party tools like Autotask, Datto RMM, SentinelOne, Pax8, Cloudberry, and Microsoft 365.

"Once I learned that Rewst could integrate with my existing tools, I gave them my exact problem. The next day, they had built a rough framework to automate it. I knew Rewst was the solution I was looking for."



Eric Marcus, founder and CEO of Marcus Networking

The decision to choose Rewst was ultimately influenced by a specific scenario Eric presented the Rewst team with at the tradeshow. Rewst's ability to immediately build a workflow addressing Eric's problem sealed the deal.

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From one-off reporting to automated billing reconciliation

Embracing the power of automation, Marcus Networking underwent a remarkable shift from manual, one-off reporting to automated, real-time reconciliation using Rewst.

To get there, Marcus Networking's automation resource went through the Cluck University training and documentation to get up to speed on the platform. In parallel, the MSP connected the tools needed to support its billing reconciliation process using Rewst's out-of-the-box integrations. From there, it was matter of using Rewst's versatile workflow canvas to visually design a workflow to seamlessly automate their reporting and approval processes.

Before Rewst, Marcus Networking had to wait for static reports sent once a month on a

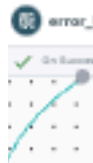
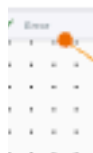
specific day to complete its reconciliation process. Now, using Rewst's API integration to access information directly from the tools, the MSP has gained real-time insights, addressing the bottleneck created by delayed reporting from vendors. This saved substantial administrative time and eliminated manual errors associated with reconciling vendor bills and customer contracts.

According to Eric, *"We've taken 40 hours a month of admin time spent on manual reconciliation to just pushing a button that triggers the process in Rewst. I can run it whenever and how often I want. It's invaluable."*

From billing reconciliation to user onboarding and other workflows

The benefits of Rewst have extended beyond billing reconciliation. Between Rewst's pre-built Crates and building its own custom workflows, Marcus Networking has automated 15+ manual processes and counting.

Among these is the Rewst user onboarding Crate, which the MSP tailored to include an approval step. When an end-user submits information, that data gets sent to a second user or supervisor for approval. This additional layer of accountability safeguards Marcus Networking by preventing unauthorized access or incorrect onboarding configurations.



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Marcus Networking has also automated smaller workflows, such as generating a ticket in Autotask when users' mailbox quota reaches a defined percentage capacity and outbound rules for Microsoft 365.

Results: Saving \$120k+ in missed revenue with automation

Rewst's impact on Marcus Networking is multifaceted, where its workflows have recouped thousands in missed revenue and elevated the customer experience.

- **Increased Revenue:** Generating real-time data helps prevent manual errors and billing discrepancies. In fact, Marcus Networking has been able to identify upwards of \$100,000 annually in missed license revenue.
- **Time Savings:** Automating repetitive processes is helping Marcus Networking save 800 hours a month, significantly improving productivity. For billing reconciliation alone, Eric estimates that the time savings equates to \$1,500 each month in labor costs.
- **Billing Accuracy:** Rewst ensures billing accuracy by reconciling all vendor bills with customer contracts monthly, highlighting discrepancies for review, and minimizing errors. This, in turn, has led to a 10-15% reduction in billing-related inquiries from clients.
- **Client Retention and Growth:** Implementing onboarding and billing workflows that incorporate approvals enhances transparency and accountability. Clients trust a service provider that demonstrates precision. This trust fosters long-term relationships, increasing client retention.

“By automating billing reconciliation, we've identified missed revenue, estimated to be upwards of \$100,000 annually. However, it's not just about the recovered revenue; it's also about the enhanced trust and transparency with our clients. The billing accuracy achieved with Rewst has strengthened our client relationships, provided peace of mind, and reinforced their trust in our operations.”

Marcus Networking: unparalleled potential

Rewst has proven itself a strategic ally for MSPs navigating the complexities of manual operations. By leveraging automation to reconcile billing, improve customer service delivery, and recover missed revenue, Marcus Networking has positioned itself as a forward-thinking MSP.

Marcus Networking's journey with automation has unlocked unparalleled potential for the company. As Eric looks toward the future, he gets excited about using Rewst to further enhance Marcus Technology's customer experience. More specifically, he'd like to build a new workflow

that alerts the Marcus Technology team when a computer has been offline for an extended period, prompting proactive conversations with customers and saving them dollars on unused devices.

"I'm genuinely thrilled with the strides Rewst is making. The platform is not only powerful but remarkably user-friendly. It's a game-changer for MSPs willing to put in some effort."

Are you ready to enhance your MSP's operational efficiency? Schedule a demo and unlock the potential of automation today.



Are you ready to enhance your MSP's efficiency and standardization?

Schedule a demo