



# Datacharlie MSP

"We Make Technology a Reality"

## Datacharlie MSP

### Customer Engagement & Service Delivery Process

"We Make Technology a Reality"

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#### STEP 1 – Customer Discovery

##### Objective

Understand the customer's business before discussing technology.

##### Team Script

"Thank you for considering Datacharlie MSP. Before recommending any technology, we'd like to understand your organization, your goals, and the challenges you're currently facing."

##### Questions to Ask

- What type of organization are you?
- How many employees?
- How many computers?
- Do you have multiple locations?
- Do you currently have an IT provider?
- What technology problems frustrate you the most?
- What are your business goals over the next 2–5 years?



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## STEP 2 – Understand Their Pain

Never sell technology first.

Sell solutions.

Example conversation:

Customer:

"Our internet is always slow."

Instead of saying

"We sell networking."

Say

"Slow internet often affects staff productivity, customer satisfaction, and revenue. We'd like to identify why it's happening and permanently resolve the issue."

Example

Customer says:

"We keep losing files."

Response

"That tells us your organization may not have an effective backup and disaster recovery strategy. Datacharlie can ensure your data is protected and recoverable."



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## STEP 3 – Offer a FREE Technology Assessment

This is where the sale begins.

Never immediately quote prices.

Say

"Our first step is to perform a comprehensive Technology Health Assessment. This allows us to understand your environment before making recommendations."

### Assessment Includes

- ✓ Computers
- ✓ Servers
- ✓ Network
- ✓ Wi-Fi
- ✓ Internet
- ✓ Security
- ✓ Microsoft 365
- ✓ Backups
- ✓ Antivirus
- ✓ Firewalls
- ✓ Cloud Services
- ✓ Website
- ✓ Email
- ✓ Staff IT Skills



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Deliverable

Professional Assessment Report

Risk Score

Recommendations

Priority List

Budget Estimate

## STEP 4 – Present the Risks

People buy because they understand risk.

Example

Instead of

"You need a firewall."

Say

"Without a properly configured firewall, unauthorized users could gain access to your business network, leading to downtime, financial loss, or data theft."

Instead of

"You need backups."

Say

"If your server fails today, how many hours—or days—could your business operate without access to your critical data?"



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## STEP 5 – Present the Vision

Customers buy outcomes.

Not equipment.

Example

Don't say

"We'll install Microsoft 365."

Instead say

"We'll enable your employees to securely work from anywhere, collaborate in real time, and reduce email and document management challenges."

Instead of

"We install Wi-Fi."

Say

"We'll provide secure, high-performance wireless connectivity that supports your staff, guests, and future business growth."

## STEP 6 – Present the Datacharlie Roadmap

Rather than trying to fix everything immediately, present a phased approach.

Phase 1

Assessment

Planning

Documentation

Immediate Risks



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Phase 2

Network Modernization

Cybersecurity

Cloud Migration

Backup

Disaster Recovery

Phase 3

Business Automation

Digital Transformation

Custom Software

AI Integration

Training

Phase 4

Managed IT Services

24/7 Monitoring

Help Desk

Maintenance

Strategic Consulting

Continuous Improvement



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## STEP 7 – Explain Why Managed Services Save Money

Most businesses think IT is expensive.

Show them the cost of downtime.

Example

One day of downtime could cost

- Lost sales
- Staff productivity
- Customer trust
- Data loss
- Reputation

Compare that to predictable monthly MSP costs.

Then say

"Rather than waiting for technology to fail, Datacharlie proactively monitors and maintains your systems to prevent problems before they impact your business."

## STEP 8 – Explain What Makes Datacharlie Different

Our Value Proposition

- ✓ 24/7 Global Monitoring
- ✓ Certified Engineers
- ✓ Remote & Onsite Support
- ✓ International Experience
- ✓ Cybersecurity First



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- ✓ Cloud Experts
- ✓ Digital Transformation Specialists
- ✓ AI Solutions
- ✓ Software Development
- ✓ Healthcare Systems
- ✓ School Management Systems
- ✓ NGO Solutions
- ✓ Government Solutions
- ✓ Starlink Deployment
- ✓ Microsoft 365
- ✓ Google Workspace
- ✓ Business Continuity

## **STEP 9 – Present Service Packages**

Instead of selling dozens of services individually.

Offer three options.

### **Essential**

Perfect for small businesses

Remote Support

Monitoring

Patch Management



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Antivirus

Monthly Reports

## **Professional**

Everything in Essential

Cybersecurity

Backup

Microsoft 365 Support

Help Desk

Quarterly Reviews

Cloud Management

## **Enterprise**

Everything above

SOC Monitoring

Compliance

Network Engineering

Virtual CIO

Business Continuity

Disaster Recovery

Unlimited Support

AI Automation

Custom Applications

Dedicated Account Manager



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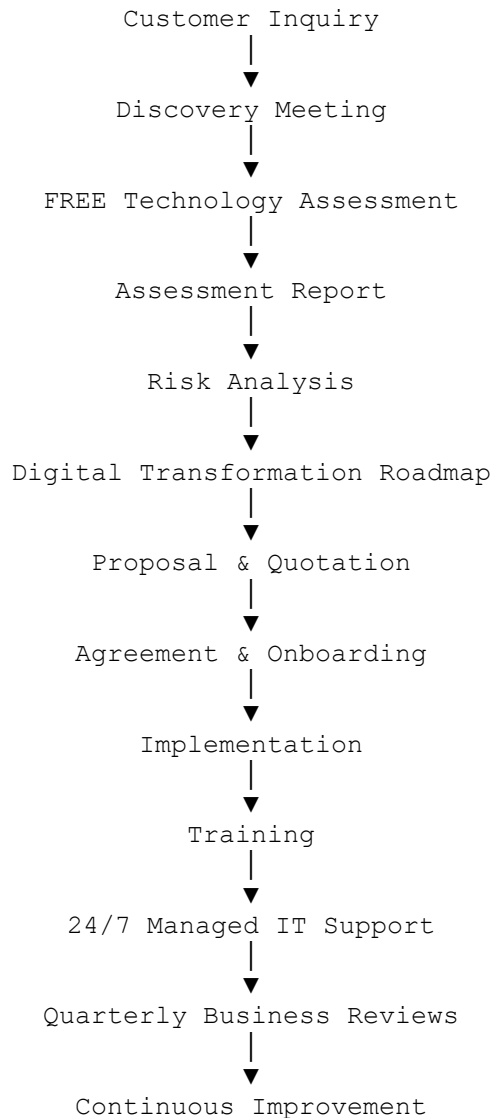
## STEP 10 – Close the Meeting

Never pressure customers.

Instead say

"Based on today's discussion, we believe there are several opportunities to improve your technology, reduce risk, and support your long-term goals. We'll prepare a customized proposal outlining our findings, recommendations, implementation roadmap, timeline, and investment options. Once you've reviewed it, we'll schedule another meeting to answer any questions and move forward at your pace."

## Customer Journey





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## The Datacharlie MSP Sales Philosophy

Every member of the Datacharlie team should remember these principles:

- **Listen before you recommend.** Understand the customer's goals and challenges first.
- **Educate rather than pressure.** Help customers understand risks and opportunities so they can make informed decisions.
- **Sell business outcomes, not technology.** Focus on improved productivity, security, reliability, and growth.
- **Build long-term partnerships.** Position Datacharlie as the customer's trusted technology advisor, not just a vendor.
- **Provide continuous value.** Every interaction should demonstrate how proactive IT management helps the customer's business succeed.