Nilear SLA White Paper

Abstract

The purpose of this white paper is to illustrate how Nilear interrupts SLA Escalations in ConnectWise. Some MSPs have received conflicting recommendations from ConnectWise which do not follow ConnectWise's own documentation. This document clarifies proper SLA Escalation usage.

Definition of SLA Escalations (as defined by ConnectWise)

http://community.connectwise.com/index.php?option=com_k2&view=item&id=4059:service-level-agreements&Itemid=330	
We have NOT responded	Ticket has been created and no one has reviewed or scheduled the issue for a resource.
We have responded	Ticket has been acknowledged and the customer has been notified by a resource that it is being scheduled for resolution.
We have created a resolution plan	A resource is now working to resolve the issue or complete the request.
We have resolved the issue	Service has been restored or the request has been completed.
We are waiting (do not escalate)	Used to place the SLA on hold for the period it is in (response, resolution plan or resolution). Generally, this is used at times when you are waiting on the customer.

We have NOT responded

This SLA escalation typically requires no explanation and is usually universally understood by both MSPs and their customers.

We have responded

This SLA Escalation should be used when three things have occurred: the MSP has communicated back in some way to the client an acknowledgement of their issue, the MSP does not have an available resource to begin working on the issue and an assignment or schedule has been recorded in ConnectWise. If the MSP does have an available resource to work on the issue, the ticket should not be in "We have responded" escalation. An assignment represents a resource that is responsible for working on the ticket or ensuring someone works on the ticket. An assignment can include an "unassigned" resource in ConnectWise if you have a Dispatch/Service Manager responsible for handling "unassigned" tickets as technicians become available. A schedule is an assigned resource with a specific date and time to perform work.

We have created a resolution plan

This SLA Escalation status is where MSPs are often in disagreement. According to ConnectWise's documentation, this status should be used when "a resource is now working to resolve the issue or complete the request". Nilear enforces the "a resource is now working" for its rules engine and requires all companies wishing to use the Nilear platform to adhere to this standard.

The prevailing counterpoint has been that "resolution plan" is used by an MSP to mean some work has been performed and plans have been made to complete the work at a later scheduled time. The use of "resolution plan" in this manner fails in three ways and each are described in full below.

Client Viewpoint of "We have a resolution plan"

From a client's point of view, the "We have responded" SLA Escalation means that the MSP has acknowledged the issue but does not have an available resource to begin or continue working on the issue. If "We have a resolution plan" is also used by an MSP to represent future work has been scheduled, the client has no means to differentiate between "We have responded" and "We have a resolution plan".

Subject to Interpretation

MSPs using "We have created a resolution plan" to mean work has been performed already on the ticket but the remaining work must be scheduled for a later time suffer from requiring someone to apply their own interpretation of when to apply this status. For example, if a tech works for an hour on an issue and determines an onsite is required and cannot schedule one until later that day, the tech will keep the ticket in a "We have created a resolution plan" status. Yet, what if the tech realizes an onsite is required within the first 30 seconds? What if the Dispatch Manager realizes an onsite is required within the first 30 seconds? Does it make a difference if the Dispatch Manager realizes an onsite is required versus a tech? Is 30 seconds not deemed as "previous work" on the ticket but 1 hour is? No SLA Escalation status can be left to interpretation by anyone within your MSP or your customers.

ConnectWise workflow automation

A key benefit of ConnectWise is not only being able to track your SLA performance but also build workflows to ensure SLAs are met. Below is a demonstration of an emergency ticket and how ConnectWise would handle SLA alerts under the two interpretations of "We have created a resolution plan".

Example SLA Policy for Company X for an Emergency Ticket

SLA Escalation	Maximum Time Target	Escalate to Management
We have NOT responded	0.25 hours	0.50 hours
We have responded	1.00 hour	1.50 hour
We have created a resolution plan	2.75 hour	3.00 hours
Time to Resolve	4.00 hours	3.50 hours

Workflow Rules for Company X
Company X has created workflow rules to send an email to management whenever "Escalate to Management" times are met on an emergency ticket SLA.

Timeline Example (Using correct "We have created a resolution plan")

Time	Action	SLA Status	SLA Time Elapsed	Workflow Trigged
10:00am	Client leaves emergency voicemail	We have NOT responded	0.00 hours 0.00 hours 0.00 hours 0.00 hours	None
10:10am	Dispatch Reviews Ticket	We have NOT responded	0.17 hours 0.00 hours 0.00 hours 0.17 hours	None
10:14am	Dispatch schedules a tech for 9:30am and emails client	We have responded	0.24 hours 0.00 hours 0.00 hours 0.24 hours	None
10:30am	Tech places ticket "In Progress" and begins work	We have created a resolution plan	0.24 hours 0.26 hours 0.00 hours 0.50 hours	None
11:00am	Tech determines onsite required. After working with Dispatch, schedules for 12:30pm (30 minute drive)	We have responded	0.24 hours 0.26 hours 0.50 hours 1.00 hours	None
11:44am	Dispatch Manager takes an early lunch – leaving no oversight	We have responded	0.24 hours 1.00 hours 0.50 hours 1.74 hours	None
12:00pm	Tech is stuck on a support call with the owner of another company and unable to begin traveling	We have responded	0.24 hours 1.26 hours 0.50 hours 2.00 hours	None

Time	Action	SLA Status	SLA Time Elapsed	Workflow Triggered
12:14pm	None	We have responded	0.24 hours 1.50 hours 0.50 hours 2.25 hours	Email sent to management warning SLA may not be met
12:14pm	Management reroutes another tech. Tech places ticket in "Traveling To" status	We have created a resolution plan	0.24 hours 1.50 hours 0.50 hours 2.24 hours	
12:44pm	Tech arrives onsite – "In Progress"	We have created a resolution plan	0.24 hours 1.50 hours 1.00 hours 2.75 hours	None
1:30pm	None	We have created a resolution plan	0.24 hours 1.50 hours 1.76 hours 3.50 hours	Email sent to management warning SLA may not be met
1:50pm	Tech resolves issue in 66 minutes	We have resolved issue	0.24 hours 1.50 hours 2.10 hours 3.84 hours	None

The above timeline demonstrates, through the proper use of SLA escalations, how Company X is doing everything it can to achieve its SLA targets by automating ConnectWise workflow rules based on SLA values.

Timeline Example (Using **incorrect** "We have created a resolution plan")

Time	Action	SLA Status	SLA Time Elapsed	Workflow Trigged
10:00am	Client leaves emergency voicemail	We have NOT responded	0.00 hours 0.00 hours 0.00 hours 0.00 hours	None
10:10am	Dispatch Reviews Ticket	We have NOT responded	0.17 hours 0.00 hours 0.00 hours 0.17 hours	None
10:14am	Dispatch schedules ticket a tech for 9:30am and emails client	We have responded	0.24 hours 0.00 hours 0.00 hours 0.24 hours	None

Time	Event	Status	Hours	Alert
10:30am	Tech places ticket "In Progress" and begins work	We have created a resolution plan	0.24 hours 0.26 hours 0.00 hours 0.50 hours	None
11:00am	Tech determines onsite required. After working with Dispatch, schedules for 12:30pm (30 minute drive)	<mark>We have created a resolution plan</mark>	0.24 hours 0.26 hours 0.50 hours 1.00 hours	None
11:44am	Dispatch Manager takes an early lunch – leaving no oversight	<mark>We have created a resolution plan</mark>	0.24 hours 0.26 hours 1.24 hours 1.74 hours	None
12:00pm	Tech is stuck on a support call with the owner of another company and unable to begin traveling	<mark>We have created a resolution plan</mark>	0.24 hours 0.26 hours 1.50 hours 2.00 hours	None
12:30pm	Tech finally ends previous calls. Tech places ticket in "Traveling To" status	We have created a resolution plan	0.24 hours 0.26 hours 2.00 hours 2.50 hours	
1:00pm	Tech arrives onsite – "In Progress"	We have created a resolution plan	0.24 hours 0.26 hours 2.50 hours 3.00 hours	None
1:30pm	None	We have created a resolution plan	0.24 hours 0.26 hours 3.00 hours 3.50 hours	Email sent to management warning SLA may not be met
1:30pm	None	We have created a resolution plan	0.24 hours 0.26 hours 3.00 hours 3.50 hours	Email sent to management warning SLA may not be met
1:30pm	Management determines there is no action they can take to improve service	We have created a resolution plan	0.24 hours 0.26 hours 3.00 hours 3.50 hours	None
2:06pm	Tech resolves issue in 66 minutes	We have resolved issue	0.24 hours 0.26 hours 3.60 hours 4.10 hours	None

The above example demonstrates several flaws with using "We have created a resolution plan" incorrectly. The email alerts to management for the missing "time to resolve" and "we have a resolution plan" fired at the same time. As the tech was already onsite, management had already missed its chance to improve Company X's chances of meeting its SLA expectations and was let with no course of action to take. Also, the final SLA performance numbers are skewed. Only 1.40 hours was spent actually working on the ticket but the "We have created a resolution plan" time reads 3.60 hours. This falsely implies the ticket required considerable work on Company X's part to resolve and there was nothing Company X could have done to meet the 4.00 "time to resolve" SLA.

Some MSPs argue they have other workflow rules or personnel procedures in place to prevent this from occurring. This is a mistake as adding rules to catch mistakes of other rules and placing further dependence on human accuracy is not the proper approach to improving one's SLA performance.

We have resolved the issue

This SLA escalation typically requires no explanation and is usually universally understood by both MSPs and their customers.

We are waiting (do not escalate)

This SLA escalation should be used when the client does not want the work to be performed right now ("Scheduled by Client"), we are waiting on a response from the client("Waiting on Client"), we are waiting for a response from a client's third-party consultant or vendor("Waiting on Vendor") or we are waiting on parts("Waiting on Parts").

Some MSPs have historically placed a "Scheduled by Client" status into "We have created a resolution plan". This should not be the case as the MSP should not be held accountable for running up an SLA clock if the client is refusing to allow the MSP to continue work. For example, the MSP can resolve the issue by rebooting the server but the client has requested the server not be rebooted until after 9pm.

Existing Workflow Rules

Many companies are hesitant to correct their Ticket Status SLA settings for fear that they will break or undo existing SLA workflow rules. If your Ticket Status SLA settings are currently incorrect but your workflow rules are working properly, it is most likely that the majority of your workflow rules are based on Ticket Status names rather than SLA values. In other words, you have Ticket Status workflow rules, not SLA workflow rules. In this case, correcting the Ticket Status SLA settings will have no impact on your current workflow rules. Any actual SLA workflow rules you may have should technically perform more accurately once your Ticket Status SLA settings have been corrected.

Color-coded Example

Ticket Status / SLA Escalation Legend

No one has reviewed ticket/We have NOT responded
Someone is assigned and not working/We have responded
Someone is working on it/We have a Resolution Plan
We are waiting for something/We are waiting
Ticket is finished/We have resolved the issue

Senario:

New Ticket comes in a 9:00 AM
Ticket is assigned to Help Desk Tech for 10:00 AM
Help Desk Tech works for 45 minutes -- needs to Escalate to Lead
Lead does not grab ticket until 1:30 PM
Lead works for 30 minutes -- needs to Escalate to Engineering
Engineering does not grab ticket until 3:00 PM
Engineering works for 45 minutes and resolves the ticket

Incorrect Use of "We have a Resolution Plan"

	Ticket Status	SLA Escalation
9:00 AM	New	We have NOT responded
	Assigned	We have responded
10:00 AM	Work In Progress	We have a Resolution Plan
11:00 AM	Escalate to Lead	
12:00 PM		
1:00 PM		
	Work In Progress	
2:00 PM	Escalate to Engineering	
3:00 PM	Work In Progress	
	Resolved	We have resolved the issue
4:00 PM		

New Status - We have NOT responded
Work In Progress - We have a Resolution Plan
Escalate to Lead - We have a Resolution Plan
Escalate to Engineering - We have a Resolution Plan
Resolved - We have resolved the issue

Final SLA Report
Not Responded: 15 minutes
We have Responded: 45 minutes
We have a Resolution Plan: 5 hours 45 minutes
Time to Resolve: 6 hours 45 minutes

Ticket Status Report
No one has reviewed ticket: 15 minutes
Someone is assigned: 4 hours 30 minutes
Someone is working on it: 2 hours
Time to Resolve: 6 hours 45 minutes

The issue is the Final SLA Report and the Ticket Status
Report should have the same numbers. Also, the SLA
Report implies the best we could of done is reduce the
time to resolved by 1 hour (15 min + 45 min) while
the Ticket Status Report implies the best we could of done
is reduce the time to resolved by 4 hours and 45 minutes.

In cases like this, workflow rules are often
created against Ticket Status values rather than
SLA values. This is not necessarily bad, but
the workflow rule is not an SLA workflow rule but a
Ticket Status workflow rule.

Correct Use of "We have a Resolution Plan"

Ticket Status	SLA Escalation
9:00 AM New	We have NOT responded
Assigned	We have responded
10:00 AM Work In Progress	We have a Resolution Plan
Escalate to Lead	We have responded
11:00 AM	
12:00 PM	
1:00 PM	
Work In Progress	We have a Resolution Plan
2:00 PM Escalate to Engineering	We have responded
3:00 PM Work In Progress	We have a Resolution Plan
Resolved	We have resolved the issue
4:00 PM	

New Status - We have NOT responded
Work In Progress - We have a Resolution Plan
Escalate to Lead - We have responded
Escalate to Engineering - We have a responded
Resolved - We have resolved the issue

Final SLA Report
Not Responded: 15 minutes
We have Responded: 4 hours 30 minutes
We have a Resolution Plan: 2 hours
Time to Resolve: 6 hours 45 minutes

Ticket Status Report
No one has reviewed ticket: 15 minutes
Someone is assigned: 4 hours, 30 minutes
Someone is working on it: 2 hours
Time to Resolve: 6 hours 45 minutes