

pax8Academy

CREATING A CULTURE OF DOCUMENTATION

Syllabus

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Course Overview

Creating a Culture of Documentation is a 5-hour course designed for partners who do not have a system of documentation in place for their business or the documentation could be more formalized, consistent, secure, and centralized.

As the world of technology continues to grow and advance, the amount of information/data needed for both the operation and security of business IT infrastructure & systems also grows exponentially. It's impossible for IT professionals to retain & remember all this information in their heads alone; it needs to be documented somewhere so it is accessible & repeatable. Writing it down somewhere is better than nothing at all, but "somewhere" needs to be both secure and readily available to reference for ultimate success.

- ✓ Increased Efficiency
- ✓ Faster Onboarding – Employees & Clients
- ✓ Minimize Risks

This course is designed for:

- MSPs just starting their IT documentation journey and don't know how/where to start.
- Teams that have some IT documentation in a variety of formats but lack formalized documentation policies or SOPs/templates.
- Teams that have IT documentation stored in a variety of locations but need establish/move into a centralized tool and structured systems to effectively manage.
- Teams that already have an IT documentation tool that has not been configured properly or is not being utilized by the team consistently.

Ideal individuals for this course would be owners, COOs or Operations Managers, CTOs, and Service Managers.

What You'll Get

- 5 hours of virtual, interactive, instructor-led content taught by an experienced MSP expert.
- Downloadable videos* of the content you can rewatch at your convenience.
- Downloadable slide decks, handouts, and homework.

Learning Objectives

By attending this course, you will learn:

- Gain understanding of WHY thorough IT documentation is important/essential for MSPs.
- The ideal features and functions to look for in your tools & systems
- Get higher buy-in from your team to use/maintain documentation.
- Mindset: Learn strategies for building a documentation culture successfully within your MSP.
- Inspect What You Expect
- Process for Maintenance/Change Log

*Videos will either be recordings from your session, or they may be previously recorded material in which partner faces and voices have been removed. It is recommended to attend courses live to reap the full benefits of Q&A with the instructor and class.

Schedule of Topics

Week 1: Why Documentation is essential for an MSP

- What do we consider “documentation”
- Why it’s essential for success
- Who should be involved in documentation

Week 2: Structure & Tools

- Standardized framework
- Compliance considerations
- Tools assessment
- Capabilities of a Document Management System (DMS)

Week 3: Standard Operating Procedures

- SOP Template
- Essential SOPs
- Naming conventions
- Approval Process

Week 4: Leading the Implementation

- Creating an implementation plan
- Motivating your team
- Inspecting what you expect

Week 5: Management and Improvement

- What is “culture”?
- Creating the norm
 - Keep it relevant
 - Continual training
 - Making it part of the job
 - Collaboration as an intention
- Continuous management
- Employee behavior

Instructor

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Next Steps

Testimonials

"This course will help you realize or confirm ways your organization may be inefficient and will help you towards taking real action to create efficiency in what we do every day as managed solutions providers. When going through this course, I've been shown a road map on how we can work towards being even more data driven and having to put out fires less! This course is a MUST for any manager, team lead, decision maker, or really anyone wanting to drive change for the better in your organization." - Shane Kessler, Standley Systems

"This course was amazing! Sara, the instructor was great and had lots of insight to share on the subject. The information provided was perfect given the length of the course. I would highly recommend this course to anyone looking to get a bit more knowledge on the importance of documentation as well as how to start thinking about creating the culture of documentation." - Justin Elizalde, 619IT

Additional Resources

Continue learning with these recommendations:

- [Scaling Up: How a Few Companies Make It...and Why the Rest Don't](#)
- [Traction: Get a Grip on Your Business](#)

Next Steps

Explore your next step with Pax8 Academy:

- On-Demand Content
 - [The Importance of Client Documentation Practices](#)
- Instructor Led Course
 - [Operations for Efficiency and Profitability](#)
- Peer Groups
 - [Join a Peer Group](#)
- Coaching
 - [Sign up for Business Coaching](#)