pax8 Academy

UTILIZING SERVICE TEMPLATES

Syllabus

Last updated: October 2023

Course Overview

Pax8 Academy – Utilizing Service Templates is a 4-session course that will provide your company with practical tips and service templates to gain efficiencies in your business. By attending this course, you will know where and how to start the process of templating core service functions. The instructor will show you how templating increases quality, reduces dropped balls, and increases employee and client satisfaction. The course will cover Service Template Optimization through ITIL standardizations of Types, Subtypes, and Items.

You will learn the core concepts of templates and their two key uses – proactive templates and reactive templates. You will also learn how to create and implement service templates to create change inside your MSP and business. In the course we will review the impact that service templates will have on the demands on Engineer time and the importance of "inspect what you expect."

Most importantly, you will know the "why" behind creating and utilizing service templates that you can take to your team to make a cultural change. Some of these reasons for utilizing service templates are:
- Improve profitability by increasing engineer utilization and time tracking
- Reduce employee and client frustration
- Create a culture of documentation

Examples will be made using ConnectWise PSA, but will be applicable to other PSA tools.

What You'll Get

- 4 hours of virtual, interactive, instructor-led content.
- Downloadable videos* of the content you can rewatch at your convenience.
- Downloadable slide decks, handouts, and additional resources.

Learning Objectives

By attending this course, you will learn how to:
- Understand why you should use service templates and how to make the most of them
- How to create proactive and reactive service templates to gain efficiencies in your business
- How to implement service templates in your business to create cultural change
- How to mine and use the data you pull from service templates

*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

- Session 1: Why you should use service templates and how to make the most of them
    - The benefit (and business justification) for investing time into leveraging templates
    - Overview of the template concept and key uses for reactive and proactive templates
    - Scheduling to enable the right person, with the right skills, and right amount of time to complete tasks

- Session 2: Proactive ticket templates, improve your team's time entries
    - Discuss creating your proactive ticket templates inside your PSA
    - How to train your team to get buy in and share the impact of templates

- Session 3: Reactive ticket templates and practical implementation
    - Understand Type-Subtype-Item
    - Start setting budget and level for templates
    - Generic auto templates vs specific auto templates

- Session 4: How to use the data from service templates
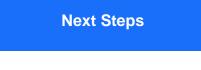   - Review reports you can pull from service templates and how to use those reports

Instructor

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Peer Group Facilitator

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Testimonials

"Through this course I learned how enormously valuable implementing service templates can be allowing an MSP to improve in many categories including: Consistency and Standardization, Efficiency and Productivity, Reduced Human Error, Speed of Response, Scalability, Training and Onboarding, Client Satisfaction, Reporting, Transparency. It's a very high value course."
- W. P. Grizard, Altrua Technology Group

Next Steps

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  o [Service Management](#)
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