

MSP Efficiency Toolkit

Show me tools to:

Automate

Integrate

Upgrade

Outsource



PHIN

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Automate

Task/Process	Why?	How?
Ticket Creation and Routing Creating tickets from monitoring alerts and assigning them based on skill, client, or urgency	Reduces missed alerts and manual triage.	- ConnectWise Automate + Manage - Autotask PSA + Datto RMM - HaloPSA
Patch Management - Scheduling OS/application patches - Verifying success/failure and retrying	Keeps endpoints secure and compliant.	- NinjaOne - Atera - N-able, - Kaseya VSA - Action 1
Backup Monitoring and Remediation - Checking for failed backups - Auto-retrying or notifying for follow-up	Ensures data is protected and recovery readiness is maintained.	- Datto, Veeam, Acronis with RMM integrations - MSP360 with PSA/RMM integrations
Onboarding and Offboarding Users - Creating accounts, assigning licenses - Adding to documentation, setting up MFA	Reduces errors and ensures consistency during high-risk transitions.	- Rewst, JumpCloud, Microsoft Entra (Azure AD), IT Glue workflows - BetterCloud or Augmentt for SaaS onboarding/offboarding
Email Filtering and Quarantine Handling - Auto-blocking known threats - Notifying users about quarantined messages	Reduces noise, improves user experience, and catches threats early.	- Proofpoint - Barracuda - Microsoft Defender for Office 365
Regular Reporting - Monthly executive summary reports - Compliance status updates	Shows clients the value you deliver, and keeps internal teams informed.	- BrightGauge - CloudRadial - Liongard
Endpoint Remediation - Restarting services, removing unwanted software - Running cleanup scripts when issues are detected	- Fixes common issues faster and more reliably. - Proves value to clients and stakeholders.	- RMM platforms with scripting (e.g., NinjaOne, Syncro, N-able) - Custom PowerShell with logic triggers
Alert Management and Escalation - Filtering out low-priority alerts - Escalating critical events automatically	Reduces alert fatigue, prioritizes real issues, and speeds up issue resolution.	- Auvik, LogicMonitor, Datadog with PSA integrations - PagerDuty or Opsgenie for smart escalation
License and Asset Tracking - Tracking SaaS licenses and renewals - Notifying of expirations or overages	- Helps maintain compliance and avoid surprise renewals. - Cuts noise and boosts focus on critical issues.	- Augmentt - SaaS Alerts - Liongard - IT Glue
Client Satisfaction and Feedback Collection - Sending post-ticket CSAT surveys - Flagging low scores for management review	Improves service through real-time insight.	- SimpleSAT - Crewhu - SmileBack (integrated with PSA)
Security Awareness Training - Sending training and phishing simulations - Tracking end-user performance - Enrolling new end-users	- Reduces time spent on repetitive, non-strategic tasks. - Maintains compliance by ensuring all necessary users are receiving relevant training.	<u>Phin Security</u> - Bullphish - KnowBe4 - Breach Secure Now

Integrate

Tool	Integrates With	Purpose	Integrations
PSA + RMM	Ticketing, monitoring, billing	- Reduce duplicate data. - Link monitoring alerts directly to service tickets. - Streamline billing and time tracking.	- ConnectWise Manage + ConnectWise Automate - Kaseya BMS + VSA - Autotask PSA + Datto RMM
Documentation Tools	PSA, RMM	- Provide context in tickets to speed up resolution. - Reduce time spent switching between systems.	IT Glue or Hudu integrated with ConnectWise or Autotask
SIEM/SOC	Ticketing systems	- Security alerts are auto-ticketed for immediate action. - Provides a closed-loop response system. - Tracks incident response timelines and accountability.	SentinelOne, Arctic Wolf, or Microsoft Sentinel + PSA
Backup & DR	PSA, RMM	- Monitor status and auto-create failure alerts within the same dashboard. - Alert failures trigger support tickets automatically.	Datto, Veeam, Acronis integrated with Kaseya, N-central, or ConnectWise
Email Security	PSA, logging	- Blocked/phishing attempts logged directly into ticket queues. - Helps demonstrate value to clients via reporting.	Proofpoint, Phin Security, Barracuda, Microsoft Defender + Autotask or ConnectWise
Endpoint Security	RMM, PSA	- Ensures proactive detection/response workflows. - Reduces time spent logging in to separate consoles.	SentinelOne, Bitdefender, ESET integrated with NinjaOne or Syncro
IAM & Directory Services	Documentation, PSA	- Streamlines credential management and documentation. - Enables auto-user provisioning/deprovisioning workflows.	JumpCloud, Azure AD integrated with IT Glue or Hudu
Billing & Invoicing	PSA	- Syncs billing info with time entries and contracts. - Reduces invoicing errors and manual entry.	QuickBooks, Xero, Wise-Sync + ConnectWise or Autotask
Client Portals	Ticketing, Billing, KB	- Centralized access for clients to tickets, invoices, and knowledge base. - Reduces support load and improves client satisfaction.	CloudRadial, DeskDirector
Cloud Services	Monitoring, PSA	- Tracks licensing, changes, and uptime automatically. - Delivers better visibility and proactive management.	Microsoft 365, Google Workspace integrated with Liongard, N-able, or Augmentt
Security Awareness Training	PSA, Billing	- Ensures you're only billed for enrolled users. - Ensures user lists are constantly updated as employees onboard and off board, making sure compliance doesn't go unchecked. - Reduces time spent on tracking training, billing, and triaging reported phishing simulations.	Phin Security, Bullphish, KnowBe4, Breach Secure Now integrated with Microsoft Azure & Defender, Google, & PSAs

Upgrade

Tool	Common Issues	Why Upgrade	Upgrade to
Legacy Backup Solutions	- Frequent failure alerts - No native cloud support or long recovery times - Weak ransomware resilience	- Cloud-first designs - Faster recovery - Ransomware detection - Centralized MSP management dashboards	- Datto - Veeam - MSP360
Outdated Antivirus/Endpoint Protection	- High false-positive rates - Heavy resource usage - Limited response and telemetry	- Behavioral detection - Automated remediation - Better MSP integration	- SentinelOne - CrowdStrike Falcon - Huntress
Low-Visibility RMM Tools	- Missing support for scripting or integrations - Laggy agent performance - Clunky UI slows technician workflows	- Report faster response times - Simpler scripting engines - Better modern UX	- NinjaOne - Syncro - Atera
Ticketing Systems Without Automation or Integration	- High manual workload - No easy way to track time, billing, or SLAs - Difficult to integrate with RMM or documentation	- Better automation - Time tracking, integrations - API support.	- HaloPSA - Autotask - ConnectWise Manage
Email Filtering and Security	- Spam and phishing still slip through - Hard to manage quarantine or end-user experience - No MFA enforcement or SSO support	- AI-based detection - User-friendly dashboards - Phishing simulation integrations	- Microsoft Defender for Office 365 - Proofpoint Essentials - Ironscales - Phin Security
Documentation Platforms with Poor Search or Permissions	- Slow UI, bad search, or poor role-based access controls - Manual documentation processes	- Purpose-built for MSP documentation - Offering auto-documentation - Integrations with RMM/PSA - Robust access control	- IT Glue - Hudu
Compliance and Risk Management Tools	- No evidence tracking or automation - Manual policy management - Limited reporting for audits	- Automate evidence collection - Frameworks - Client-facing compliance reporting.	- Drata - Tugboat Logic - Klint
Security Awareness Training	- Boring, limited, and/or outdated content - Limited reporting - Limited automation and integrations - Time consuming set-up	- Set and forget automated training - Quick, relevant training based on current topics - Backend built for specifically for MSPs to spend as little time as possible setting up and managing	<u>Phin Security</u>. - Bullphish - KnowBe4 - Breach Secure Now

Outsource

Task	Why?	Outsource to
After-Hours and Overnight Help Desk Support	- Maintaining 24/7 in-house support is expensive. - Outsourcing ensures uninterrupted coverage and fast response times while your team rests.	- NOC4MSP - GMS Live Expert - ITBD - InBay
Network Operations Center (NOC) Monitoring	- NOC monitoring is resource-heavy and requires constant attention. - Outsourcing ensures uptime, proactive response, and scalable support.	- ConnectWise NOC - Rewst - IT By Design - NOC Buddy
Security Operations Center (SOC) / Managed Detection & Response (MDR)	- Cybersecurity requires deep expertise and constant vigilance. - Outsourcing fills talent gaps and reduces response time to incidents.	- Arctic Wolf - Blackpoint Cyber - SKOUT - RocketCyber
Project Work (Migrations, Deployments, Audits)	Large-scale IT projects strain internal teams and often require expertise you don't need year-round.	- Worklyn Partners - CNS Partners - Electric.ai
Compliance and Risk Management	- Compliance frameworks like HIPAA, NIST, or CMMC are complex and constantly evolving. - Outsourcing ensures accurate tracking and guidance.	- Tugboat Logic - Klint - Vanta - Drata - Compliance Scorecard
Sales and Lead Generation	- Building a strong sales pipeline requires time, expertise, and consistency. - Outsourced SDRs and appointment setters scale growth.	- Managed Sales Pros - Leadium - EBQ - Marketopia
Finance, HR, and Payroll	- These back-office tasks are essential but not strategic. - Outsourcing reduces error risk and ensures compliance.	- Gusto - Justworks - Pilot - Bench - Ttrinet
Content and Marketing Execution	- Marketing requires consistency and creativity. - Outsourcing saves time and leverages experienced content creators.	- The Launchpad - Tech Pro Marketing - Ulistic - Marketopia - MSP Camp - The Tech Tribe
Security Awareness Training	- Consistently providing new, updated, and relevant content that meets compliance standards is extremely time-consuming. - Outsourcing ensures you're meeting compliance standards and saving time with an automated, ready to go platform that delivers training, phishing simulations and reporting with just a few clicks.	Phin Security. - Bullphish - KnowBe4 - Breach Secure Now