



# How to Build a Productive Documentation Culture Inside Your MSP

# Introduction

You may be all in on documentation, but unless the documentation culture is ingrained into your MSP, you may struggle to leverage it. That's what we cover in this e-book, the guidelines and frameworks to build a productive documentation culture.

The thing about documentation culture is that it requires persistence and proactiveness. Hence, we begin the e-book by explaining the role of documentation in improving customer experience, neatly segueing into why you should measure documentation metrics.

In chapter 2, we reveal how to identify key documentation metrics and how to benchmark them. While in chapter 3, the focus is on the ROI that these metrics provide. Chapters 4 and 5 are all about implementation, explaining what positions/roles in the company are accountable for each metric and how to use them to motivate your employees. Finally, we end the book with case studies and results from successful MSPs.

By the end of the book, you will be able to identify key documentation metrics, measure them effectively, and use IT Glue-CrewHu integration to gamify the process and motivate employees to document.



## Chapter 1

# How productive documentation leads to improved customer experience?



A culture shift is not easy to achieve. You are bound to face resistance as employees have to give up familiar routines and embrace the unknown. More so when it is something like documentation. Let's face it; documentation can involve a lot of upfront work before the return on your investment is realized. So, how do you overcome resistance to this work? For starters, help your team understand productive documentation can make their lives easier and enable your MSP to provide a superior customer experience. The up front work in building out documentation is an investment in their future peace of mind and happiness.

Introduce IT Glue to your team. Showcase how it simplifies and streamlines documentation with automation, integrations, and relationship mapping. More importantly, highlight the ease of pulling up information about a client or a device and how it eliminates last-minute scrambles, shoulder-tapping, and stuttering responses to clients.

Ultimately, having all of your clients' information documented, alongside your processes, allows you to ensure you are always providing a superior customer experience.

Deploying IT Glue and getting everyone on board is a great start, but then what? After the initial documentation blitz, how do you maintain consistency and ensure it is positively impacting your business? That's where documentation metrics come into play.

Documentation metrics help you measure your team's current performance (using lagging indicators) and also make informed predictions (using leading indicators) about how it will contribute to your business growth.

With these metrics, you can tie documentation's impact on ROI, make it a part of job descriptions, and use it to set benchmarks and motivate your employees.



## Chapter 2

# Key documentation metrics

High documentation maturity can often lead to faster troubleshooting. However, without metrics to back it up, you won't be able to tie the two together. Without that validation, it is hard to build a productive documentation culture.

That's why you must identify, monitor and track certain critical documentation metrics – not only will it help you find out how well your team is documenting everything, but also use the data to make improvements.



**4** key metrics that you need to focus on are:

Documents Created

Documents Viewed

Documents Updated

Documents Deleted





## Documents Created

A count of all the documents created by your team. Monitoring this should help you understand what percentage of your clients' environments are documented.



## Documents Updated

It covers the total number of documents that were edited by your team. Keeping an eye on this should help you weed out outdated information and ensure documentation is being seen as an on-going exercise.



## Documents Viewed

This stat indicates the total number of views these documents are garnered in a particular timescale. It should reveal if your team is actually using documentation while troubleshooting or solving customer tickets.



## Documents Deleted

It counts the number of documents that were removed from the central hub. Again, a good way to keep outdated information in check, which only adds clutter, leads to errors and slows your team down.

Once you know what to document, the next step is to set benchmarks. The idea is that if your team can meet these benchmarks consistently, it indicates your MSP is on course to achieve high documentation maturity.

As per our Global MSP Benchmark Survey, IT Glue partners with high documentation maturity levels are more likely to see revenue growth, onboard new techs faster, scale effectively and maximize their non-technical teams' efficiency.



**Now we can't tell you what the ideal benchmarks are because every MSP is different. Here's a few examples that you can follow:**

For documentation completion, determine the must have documentation, without which the account will not be considered 100% documented. This way, you're not measuring completion against some hypothetical "if we knew absolutely everything and had an SOP for every conceivable scenario" benchmark. Rather, you're setting the documentation completion benchmark in terms of what you absolutely require to service your clients effectively. You can have a separate benchmark for the items that are considered nice to have.

You're less likely to have benchmarks for viewed and deleted because that's going to come down to individual need. But for documentation updated, that can be again based on what has to be updated. Set flags and notifications to identify what updates are required, then focus on getting 100% completion on those updates.



## Chapter 3

# What is the ROI that these metrics provide?

Now that you know what to measure, the next step is to tie these metrics to ROI. When your team, including the management, are aware that these metrics impact your MSP's bottom-line, they are more likely to take it seriously.

Use our [Cost of Waste Calculator](#) to determine the costs you create from time wasted and process inefficiency in your business.

Furthermore, it takes almost 3 months for an average MSP to onboard a new tech and to get them to work at 80 percent efficiency. This period of training could cost you approximately \$35,088. But for best-in-class MSPs with great documentation practices, it only takes 4 weeks, costing them roughly \$12,642.





## Chapter 4

# What positions/roles in the company are accountable for which metrics?

Everyone should be involved in the documentation process, right from the owner to the non-techs. Putting one person in charge of creating and maintaining documentation will not help you build a documentation culture.

When it comes to making people accountable for documentation metrics, you can appoint one or two documentation leads. Preferably, it should be people who interact or use documentation regularly.

For instance, your service desk manager or your IT Glue Champion can monitor operational metrics such as documents created, documents deleted, and others. While, you can assign your COO or CTO, depending on your organizational structure, to track the Documentation Engagement Scores and how the different metrics are impacting your ROI.

Also, consider having a peer review structure in place to review the documentation. This way, each member works with a teammate to ensure that the document is complete and adhere to agreed stipulations.



## Chapter 5

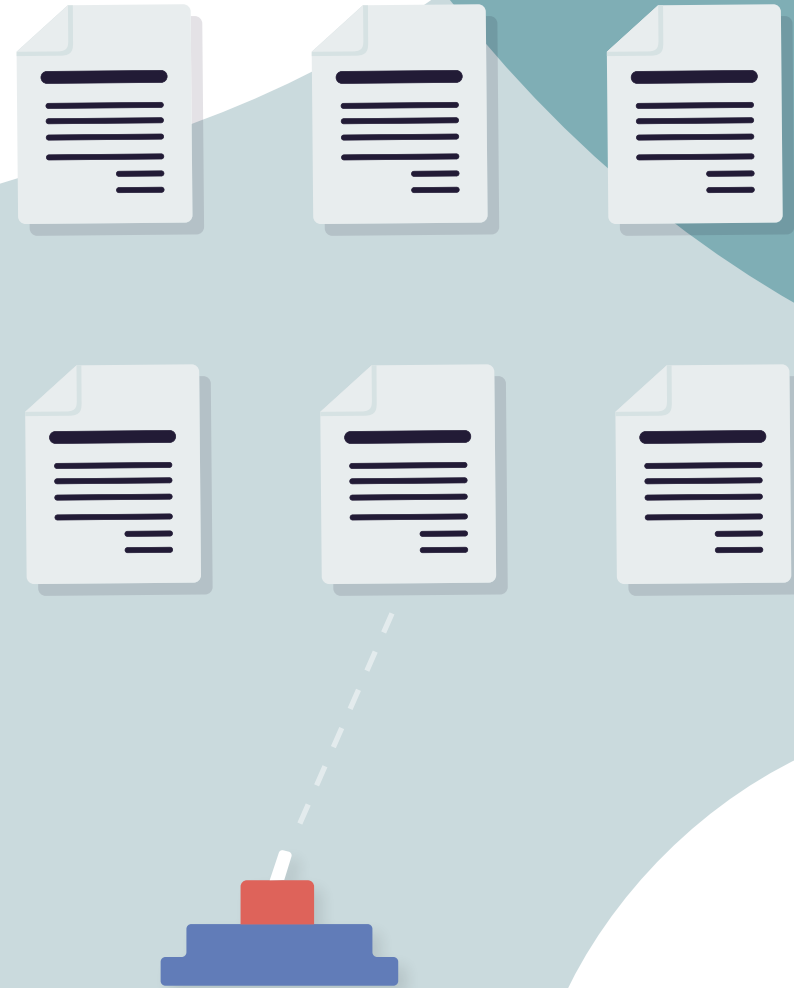
# How to use documentation metrics to motivate employees?

Monitoring documentation metrics and tying them to ROI does help in triggering intrinsic motivation in employees. However, as documentation can be dull and tedious, you need to encourage them further with extrinsic motivators to sustain the momentum.

Gamify documentation. Use game design techniques, game mechanics, and analytics to measure, identify and reward employee behavior and performance connected with documentation. Not only will it encourage them to document more, but it also helps eliminate the negative associations with documentation.

IT Glue has a built-in documentation gamification feature, called [Engagement](#). Combined with the [documentation completion profile](#) to identify gaps, Engagement allows you to see who's engaging with IT Glue and reward them accordingly.

And that's only half of it. IT Glue integrates with the popular MSP-focused employee engagement system, [CrewHu](#). This integration allows you to run contests based on the documentation metrics you are tracking. It comes with a leaderboard, allowing you to trigger your employees' competitive spirit and reward them for hitting documentation goals.





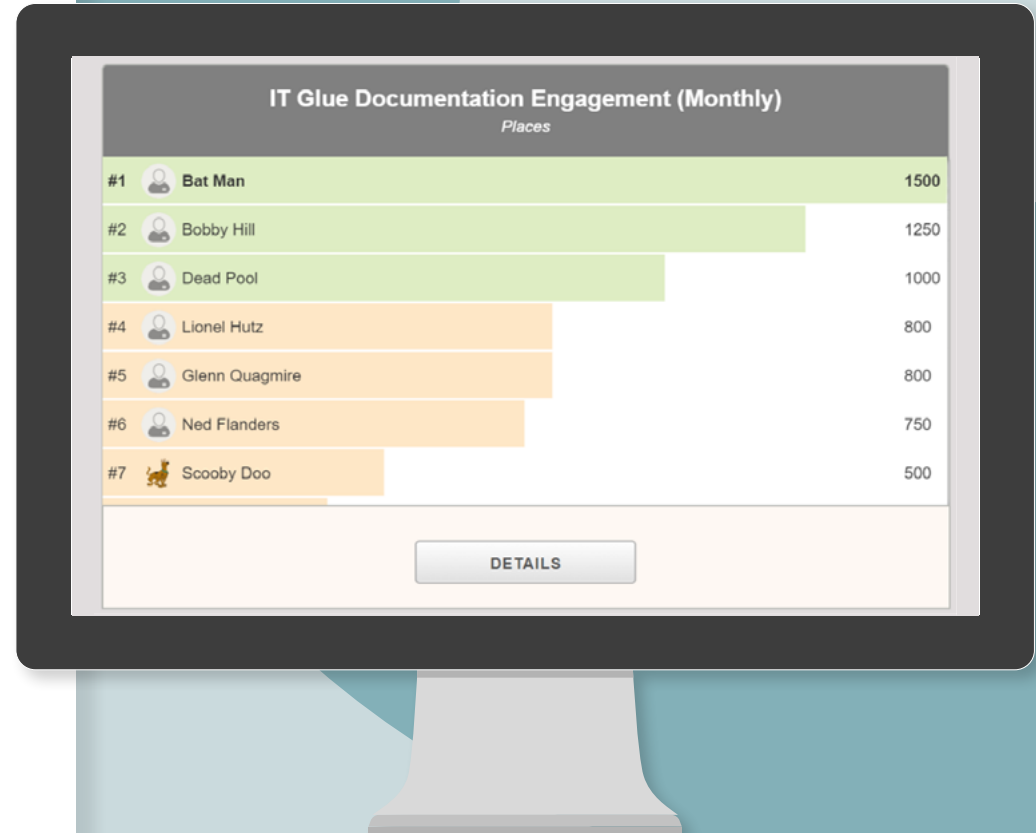
## How to launch a contest using the CrewHu-IT Glue integration?

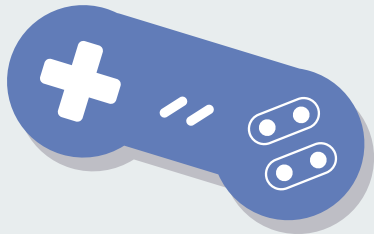
Before you run the contest, you need to decide on a scoring system. The integration offers a default [Documentation Engagement Score](#), which takes into consideration Document Created, Document Updated and Document Viewed.

Each employee will get 10 points for each new document created, 5 points for each document updated, and 1 point for each document viewed. In case you are not happy with this setup, it gives you the option to create your own scoring system.

### Steps involved in running a contest

- Activate the CrewHu-IT Glue Integration
- Choose a scoring system – custom/default
- Set up the content by adding relevant information such as timeframe, goals, teams involved, description, etc.
- Click save and make it live





## Conclusion

Establishing a documentation culture is hard work for some teams. But MSPs can't afford to put it on the back burner anymore. The competitive advantage it offers, when leveraged fully, is there for everyone to see.

While the importance of your documentation might feel overwhelming, IT Glue offers you everything necessary to maximize your information's efficiency, accessibility, and security. As a central hub for all of your data and processes with customizable accessibility for all of your staff, using IT Glue for your documentation practices will lead you to documentation mastery.

**To learn more, we invite you to invest a few minutes in a quick demo.**

**GET A DEMO TODAY!**