



How To Fix MSP Project Management

MSPs struggle with projects. We know, because TopLeft came from an MSP that struggled with projects. Every element is hard- understanding what tasks are started or completed or delayed, seeing who is responsible for tasks, estimating when you can start a new project, balancing customer, and internal projects, and communicating with the customer.

Using a PSA such as ConnectWise or Autotask doesn't make it any easier. These tools record your project data but don't provide any tools for visualizing it or understanding it.

As a project manager, you're on your own. Or are you?

At TopLeft, we understand how hard your job is. You're not alone. We hope the practices and tools described in this whitepaper help you take back control of your project work.

Read on to learn:

- How our MSP struggled with project management
- The visualization techniques that make it easy to understand your projects
- Our easy-to-remember framework for executing projects successfully: IBEAM
- How Kanban by TopLeft can help you



How Our MSP Struggled with Project Management

TopLeft is a unit of an established MSP, Kerkhoff Technologies. Located in the Vancouver, British Columbia area, it has become one of the region's most respected MSPs.

We didn't always have good project management practices. Despite using ConnectWise, we had a lot of project problems. We had many tickets started and not finished. At one time we had 400 open tickets with only 10 engineers. If you did the math, 40 tickets per engineer is way too many!

Our projects stalled and we didn't know what tickets were close to being completed. Our clients felt neglected. Our team was siloed. It took a lot of time to update project data in our PSA.

To address this, we drew from our experience in agile software development, applying similar techniques to

MSP project management. We built a tool that displays project data from PSAs on a Kanban board—allowing managers and engineers to visualize tasks, reduce work in progress (WIP), and improve communication in the team.

Visualizing your work in a new way might sound like a simplistic solution. But when you couple it with some basic practices, it will allow your team to work with clarity and purpose, helping them to prioritize, identify, and complete project work one task at a time.

The Visualization Techniques That Make It Easy to Understand Your Projects

A Kanban board is a visual tool for keeping teams organized and informed. Boards help teams collaborate, manage, and optimize their workflow.

Kanban boards help you and your team:

- See work in progress- so you can limit it so as to maximize efficiency
- Stop work from falling through the cracks
- Highlight problems, such as overdue or over budget tickets
- Improve team velocity by identifying and addressing bottlenecks
- Communicate in your team- everyone gets the exact picture of what's going on
- End the feeling of overwhelm

In a Kanban board, data is arranged visually in a series of columns that represent the lifecycle of your

project tickets. This is much easier to understand than looking at the data tables and work breakdown plans shown in your PSA.

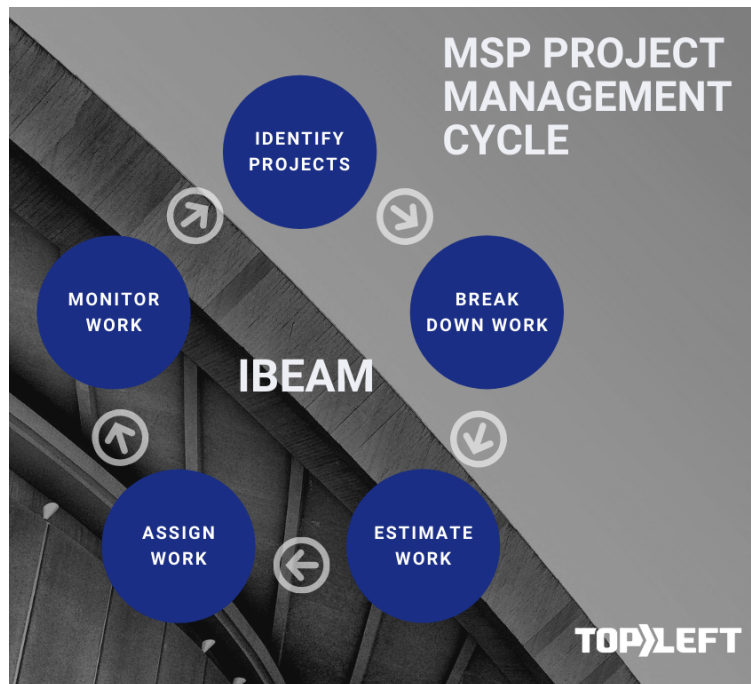
The human brain is visual by nature. Did you know it processes images 60,000 times faster than text? And 90 percent of information transmitted to the brain is visual. Kanban uses this to enhance your team's effectiveness at work. The more you visualize, the more likely you'll be able to stay aligned on tasks and deliver work on time.

The right project visibility tool offers you a clear picture of what's happening with your projects at any stage. It helps you to allocate resources and identify potential risks. When tasks become visual, you improve communication, collaboration, and problem-solving.



The MSP Project Management Cycle: IBEAM

You don't have time to learn a complicated new process, so this framework is simple and easy to remember. It will help you deliver projects on time, to identify problems early, and keep your team on track. Kanban helps achieve each stage of the cycle.



The stages in the TopLeft project management cycle are:

1. Identify projects: get a complete list of your team's obligations, including internal non-billable work
2. Break down work: for each project you identified, determine the key work items for the upcoming stage of the project
3. Estimate work: for the work items you identified, estimate the size in hours or story points
4. Assign work: now that work is estimated, assign it to an engineer
5. Monitor work: watch for problems and resolve as necessary

While you're monitoring work, engineers are diligently completing tickets. When you need to refill their queues with more work, start the cycle over again.

Kanban boards make this process very easy. You can even use physical Kanban boards, without TopLeft's Kanban solution.

Identify Projects

A project is a series of connected tasks, aimed to deliver a goal, that are planned and directed by you. This differs from service-oriented work that requires little planning and is directed by the client. A project may have multiple engineers working on it and has a clear scope and schedule agreement with the client.

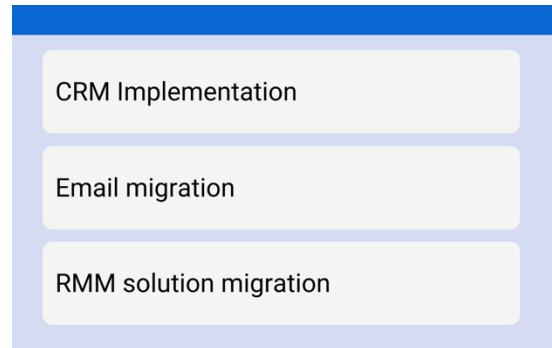
Hopefully you have a list of your current client projects in your PSA already. If not, make that list right now.

Also include internal projects- for instance, migrating your MSP to a new RMM solution. Include anything your project engineers are working on. Your engineers could be spending 30% or more of their time on non-billable work, and this will make a huge impact in your planning for billable work if you don't account for it.

What does it look like in Kanban?

You can start using Kanban boards even without TopLeft's solution! These boards don't have to be pretty or use technology.

You can begin the process on a wall or whiteboard. When you make columns, to make lines you can use painters' tape or a whiteboard marker. Write the name of each project on the whiteboard or on paper in a horizontal lane for the project. We call these lanes "swimlanes". In the next stage of the cycle, use sticky notes to record the name of each project task.



In the example above, we have a few projects- CRM implementation, email migration, and RMM solution migration. You'll probably have a lot more projects than this, but this gives you a good idea. Now you've identified your projects, and you're done this stage of the cycle!

Break Down Work

The next step is to identify the upcoming work items for the projects you identified.

How much of the project needs to be planned? You don't want to plan too little, as your team will run out of work, and you'll need to return to this step in the cycle right away. But you also don't want to plan too much, because in the future the project could change in ways that make your planning obsolete, wasting your work.

We recommend planning for one key milestone or phase of the project at a time. A milestone represents something useful delivered to the client, even if the project isn't complete. Planning one milestone at a time limits the amount of work you do that might have to be thrown away if the project changes. Because the milestone represents one clear deliverable, it's easier to think of the important work items needed to complete it, so you don't miss anything.

Who breaks down the work?

It should be somebody familiar with the project technology, such a project manager with engineer experience. However, the project manager doesn't have to do it. He is just responsible for making sure it gets done.

If you're using a PSA such as ConnectWise or Autotask to manage your projects, breaking down work means creating tickets in the project work plan. You'll need to decide which ticket fields to use. We suggest you use these fields:

- Summary/title
- Description – ensure this lists a clear scope so everyone (you as the PM, the client, and the

engineer doing the work) agrees when the ticket is complete.

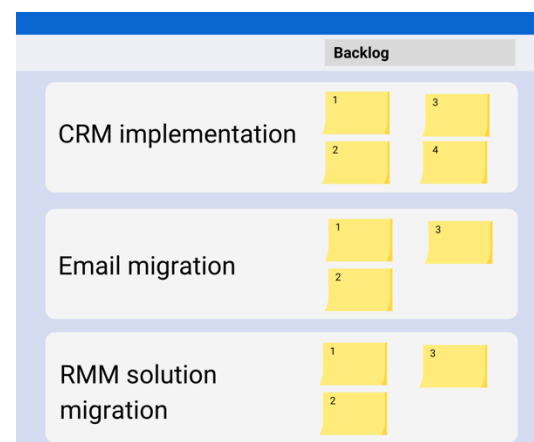
- Due date- only use if there is an external constraint on the work, such as a contractual agreement or an event whose date cannot change. Do not use due date for managing work.

There are some fields you shouldn't set:

- Start date: if you use this, you'll be "pushing" work to engineers who may not have capacity to take on new work, instead of letting them "pull" work when they have capacity. Avoid this.
- Duration- this is also a variation of "pushing" work
- Budget- this is set in a later stage of the cycle
- Assigned technician- this is also set in a later stage

What does it look like in Kanban?

For each task, write the name on a sticky note, put it in the swimlane for its project, in a column labelled Backlog, and arrange them top-to-bottom in the order they should be completed.



Estimate Work

In the Estimate step, you estimate how long the task will take to complete. Do this so you can make educated decisions about prioritizing work. For example, sometimes it's useful to prioritize doing many small tasks instead of doing a single large task, to demonstrate progress for a client or to simply clear up the project backlog.

Who does the estimating?

As with the Break Down stage, the estimating work needs to be done by somebody who is familiar with the task and technology. If you come from an engineering background, you can do it. If not, then assign this work to your engineers. The project manager is only responsible for ensuring it gets done.

As an alternative to estimating in hours, some managers like to use something called story points. This estimates the amount of relative complexity in the work rather than the amount of time to finish it. For example, the most simple work would be 1 story point, something twice as complex would be 2 points, and the most complex work could be 20 points.

One benefit of story points over hours is that while people with different skills will complete the same work in different amounts of time, an engineer's skill level has no bearing on the amount of complexity of the work.

Why don't we do estimation at the same time we break down the work?

Because it delays estimation until scope changes from prior parts of the project are done, so these changes can inform your estimates. For instance, engineers could work on an early part of the project and find the project is unusually complex. If you estimated other work early, you might have to return to those

estimates and make changes, wasting your work. But if you delay your estimation, you can use what your engineers learn through the process to set reasonable estimates the first time.

If you find you've estimated a ticket at more than two days, break it down into smaller chunks. A large scope more than two days leaves a lot of room for individual tasks to get out of control and take all the allocated time before you notice there's a problem.

What does it look like in Kanban?

Move work from the Backlog column to the Needs Estimation column, then estimate and move to the Ready column, which is when an engineer can actually work on that task.

	Backlog	Needs Estimation	Ready
CRM implementation	1 2	4	3
Email migration	1 2	3	
RMM solution migration	1		2 3

Assign Work

The Assign Work stage is the trigger for an engineer to begin the project work. In this stage you put tickets into a queue where an engineer will eventually work on it. You also prioritize the work, indicating the order each ticket should be started.

When organizing work, you need to consider a few things:

- The size and importance of each project- the tickets for more important projects should be done before tickets for less important projects
- How each project fits together- the dependencies between work items that require certain tickets to be done first
- Engineer knowledge- engineers who aren't familiar with a certain technologies, projects, or clients may not be able to perform certain work without first receiving training

Try to distribute work uniformly to engineers in your team. If work isn't distributed uniformly, some engineers will be too busy and become a bottleneck, slowing down your team's overall velocity.

Bonus:

An advanced technique can save you the work of assigning tickets. Instead of giving each engineer their own queue of work, make only a single queue of work. So instead of prioritizing and assigning work, you only prioritize it. Engineers take work from the top of the list when they have capacity. You can only do this if each engineer in your team can work on any project ticket. This may be impossible for your team right now- but you can achieve this by training your junior engineers and ensuring each client and project has good documentation.

What does it look like in Kanban?

In the graphic below, notice work is arranged differently than in earlier stages. Instead of grouping by project, now work is grouped by the assigned engineer. In the example, Terry and Nicole have clear areas showing their work. Take cards from the project swimlanes and put them in an engineer's swimlane in the Ready column. Rank the tickets in the order each engineer should start them. This gives you, the project manager, control over how the work is completed.



Monitor Work

In the final stage of the project management cycle, you monitor how the work is moving forward. This isn't like the other phases in the cycle, where you finish it and then you move on to the next stage. Monitoring is what you do at any time in the cycle when you're not working on the other stages.

This doesn't mean it takes a lot of time- monitoring is meant to be simple. You will identify the work that isn't going well and spend very little time thinking about tickets that have no problems.

What to watch for

Monitor your team's work for these problems:

- Due date vs. progress- is it already overdue, or based on current progress is it expected to miss the due date?
- Hours logged vs. budget- is it already over budget, or looking likely to go over budget?
- Long time without changing status
- Long time without a time entry or note
- Bottlenecks- too much work assigned to one engineer

How to fix problems

Apply these simple techniques to get your projects back on track:

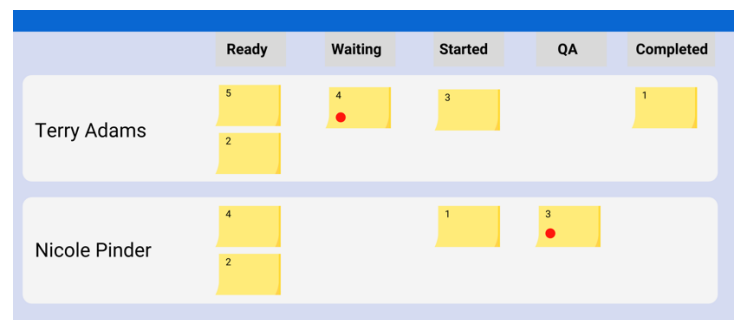
- Re-assign work to a different engineer- this helps especially if the current engineer has too much work
- Suspend new assignments to busy engineers to reduce work in progress
- Split large or delayed tickets up into smaller tickets- especially for tickets where part of the work is complete, and part of the work is delayed or going over budget

- Cancel work- if the work is no longer required or customer isn't responding to your questions

What does it look like in Kanban?

When an engineer is ready to start a new ticket, he or she takes the top ticket from their Ready column, works it until it's done, and moves it to the Completed column. If the ticket can't be finished due to needing information from the customer, or needing something from a third party, move it to the Waiting column.

As a PM, you watch for problem tickets and indicate them with marks on the card- red for serious problems and orange for potential problems. Take corrective action with the engineers.



How Kanban by TopLeft Can Help You

As an MSP, we know PSAs have severe weaknesses, such as:

- No easy way to visualize projects
- Requiring lots of clicks to do anything in the project module
- No way to manage multiple projects at once
- Inability to monitor bottlenecks or neglected work

You could solve these problems by using third-party project management software such as Trello or Asana. But these tools aren't integrated with your PSA, so you'd need to enter all your data in both systems, duplicating data and wasting time. Or you'd need to keep data in only one system, but then you lose the benefit of keeping project data in your PSA with all the service, client, agreement, and billing data. Then you may as well not even use a PSA.

We built TopLeft because we needed all our data in one place but refused to waste our time entering project data in two systems.

TopLeft for ConnectWise Manage and Datto Autotask PSA offers you Kanban boards for visualization and easy project management. You can see multiple projects at once- both at the project and ticket level. You can quickly identify bottlenecks and neglected work and overdue tickets and tasks.

Best of all, TopLeft integrates directly with your PSA, so you can improve your practices with Kanban boards without having to enter all your data in two systems. You can add Kanban to your current workflows and get better visualizations without having to make massive changes to your existing workflow or PSA setup.

What our clients have to say:

TopLeft turned project management from starting at huge lists, impossible to prioritize- into easily digestible, very visually compelling information.

It made flow of tickets a lot easier to see. In our PSA, we weren't able to see projects side by side; now we're able to see project together.

Sarah Ellis

Clear Guidance

Visualize your projects and deliver projects quicker than the competition – without burning out your team.

Schedule a Demo: <https://www.topleft.team/schedulecall>

