



No More Neglect

Stopping Tickets From Falling Through the Cracks

TopLeft knows the problems faced by MSPs.

As a division of Kerkhoff Technologies, a respected MSP founded in 2007, we understand how easy it is to be overwhelmed with tickets and to find work becoming neglected.

When you follow the steps in this document, you'll find yourself **in control of your work**, with effective managers, productive engineers, and very happy customers.

Learn how to...

- Define neglect thresholds
- Identify tickets that violate those thresholds
- Keep relevant metrics
- Incorporate reporting into your workflows to minimize neglected work
- Use Kanban boards to improve efficiency and eliminate neglected work



Running a Managed Service Provider (MSP) can seem like juggling- keeping a dozen things flying through the air, catching whatever is about to crash down and launching it up again just in time to catch the next thing. It takes an enormous amount of effort to keep everything in the air- and eventually it all comes crashing down.

Do any of these things happen in your MSP?

- Technicians have dozens of in-progress tickets
- In-progress tickets aren't touched for days
- Tickets waiting on a customer response go three weeks without a followup
- Customers call to ask what's going on with their tickets
- Ticket SLAs are frequently violated

This happens because common PSAs such as ConnectWise Manage and Datto Autotask PSA make it difficult to identify tickets that haven't had any recent activity. All tickets are treated equally, no matter how long since they received attention from a technician. And service managers can't easily see which tickets are neglected and so can't investigate and prioritize older work.

But customers know when their tickets are being neglected, and they're not afraid to let you know about it!

Good news- you don't have to keep juggling forever. There are ways to identify neglected tickets before they cause problems, giving you more control over your work and eliminating the feeling that everything is about to crash down.

1

For Each Ticket Status, Define the Threshold for Neglect

Before you can identify which tickets in your PSA are neglected, you need a clear definition of neglected. This prevents miscommunication in your team about which tickets are neglected.

Decide how many days a ticket can be ignored before being considered old. But there's not one period that works for all tickets- each ticket status needs its own neglected threshold. This is because tickets in one status can be expected to see activity very frequently, while tickets in other statuses may be expected to have less frequent activity. For example, a ticket in a New status (received from the client, no action yet taken) should typically have activity within a few hours, while an In Progress ticket should have an activity every two days.

Complete this table to document how long a ticket in each status can go without activity before it is considered neglected.

Status	Neglected Threshold (days)	TopLeft recommendation
New		2 hours/0.25 days
Ready		2 days
In Progress		2 days
Waiting on Customer		7 days
Waiting on Vendor		7 days
Scheduled		14 days
Completed	Not applicable	Not applicable

Write your custom statuses here

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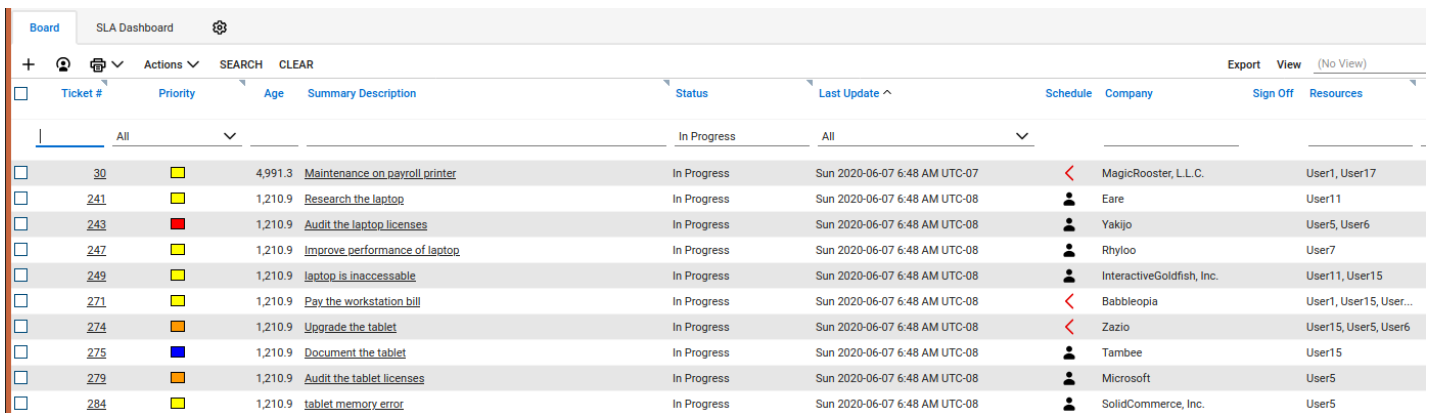
Create Reports in Your PSA to Identify the Neglected Work

You've defined the neglect thresholds for each status, so now create reports and dashboards to help you identify those neglected tickets as easily as possible.

ConnectWise Manage

It's not easy to identify neglected service tickets in ConnectWise. To see which service tickets are neglected, perform these steps:

- 1) Navigate to the service board by clicking Service Desk > Service Board in the main menu.
- 2) In the Business Unit and Service Board fields, make the appropriate selections so the report includes all the service boards for which you need to see neglected tickets.
- 3) Ensure the Last Update column is visible in the table without scrolling. You may need to drag the Last Update column to the left area of the table, or make it visible by selecting it in the Visible Columns section of the List View Configuration dialog (available from the ⚙ button).
- 4) In the Status field, type In Progress (or the name of another key ticket status) and press enter.
- 5) Click the Last Update header so that tickets are sorted with the least recently changed (most neglected) tickets at the top. Your pane will look something like this:



The screenshot shows the ConnectWise Manage Service Board interface. The table displays tickets with columns for Ticket #, Priority, Age, Summary Description, Status, Last Update, Schedule, Company, Sign Off, and Resources. The tickets are filtered by 'In Progress' status and sorted by 'Last Update' (least recent first).

Ticket #	Priority	Age	Summary Description	Status	Last Update	Schedule	Company	Sign Off	Resources
30	Yellow	4,991.3	Maintenance on payroll printer	In Progress	Sun 2020-06-07 6:48 AM UTC-07	<	MagicRooster, L.L.C.		User1, User17
241	Yellow	1,210.9	Research the laptop	In Progress	Sun 2020-06-07 6:48 AM UTC-08		Eare		User11
243	Red	1,210.9	Audit the laptop licenses	In Progress	Sun 2020-06-07 6:48 AM UTC-08		Yakijo		User5, User6
247	Yellow	1,210.9	Improve performance of laptop	In Progress	Sun 2020-06-07 6:48 AM UTC-08		Rhyloo		User7
249	Yellow	1,210.9	laptop is inaccessible	In Progress	Sun 2020-06-07 6:48 AM UTC-08		InteractiveGoldfish, Inc.		User11, User15
271	Yellow	1,210.9	Pay the workstation bill	In Progress	Sun 2020-06-07 6:48 AM UTC-08	<	Babbleopia		User1, User15, User...
274	Orange	1,210.9	Upgrade the tablet	In Progress	Sun 2020-06-07 6:48 AM UTC-08	<	Zazio		User15, User5, User6
275	Blue	1,210.9	Document the tablet	In Progress	Sun 2020-06-07 6:48 AM UTC-08		Tambee		User15
279	Orange	1,210.9	Audit the tablet licenses	In Progress	Sun 2020-06-07 6:48 AM UTC-08		Microsoft		User5
284	Yellow	1,210.9	tablet memory error	In Progress	Sun 2020-06-07 6:48 AM UTC-08		SolidCommerce, Inc.		User5

2

Create Reports in Your PSA to Identify the Neglected Work

ConnectWise Manage (continued)

Review each ticket whose last updated date is prior to the neglect threshold you defined for the In Progress status. For example, if the date is July 15 and the threshold for the In Progress column is 2 days, then review tickets last updated on July 13 or earlier.

Repeat the process for all the other statuses. You can set up custom views for each status to make it easier to change between statuses.

Engineers can see their own neglected tickets by adding their own username to the Resources search field.

Unfortunately, it's not possible to identify neglected project tickets in ConnectWise because it doesn't offer the Last Updated field in the Project Ticket Search page. This makes it impossible to see the last updated date for project tickets in a single view.

2

Create Reports in Your PSA to Identify the Neglected Work

Datto Autotask PSA

Autotask has a powerful widget feature that can be used to identify neglected tickets. You'll need to create one widget for each ticket status you're interested in, and you might want to put them on a dedicated dashboard tab. Follow these steps:

- 1) Create a tab for listing neglected tickets. Click the + button in the tab bar and create a new blank tab. Name it "Neglected Tickets".
- 2) Add a widget to the tab. The entity is Tickets and Widget Type is Grid.
- 3) Set the label to "In Progress tickets".
- 4) In Primary/First Column, select the Ticket Number and Title columns.
- 5) In Additional Columns, select Time in Current Status (Days), Last Activity Date, Resource and other columns that are important to you. It should look like this:

The screenshot displays the configuration interface for a widget in Datto Autotask PSA. It is divided into two main sections: 'PRIMARY/FIRST COLUMN' and 'ADDITIONAL COLUMNS'.

PRIMARY/FIRST COLUMN:

- Primary Column:** A list of available columns including Account, Account Manager, Age (in days), Associated Incident Tickets, Change Request Approval Status, Change Request Approvers, Classification, Complete Date, and Completed By.
- Selected Columns:** A list of selected columns including Ticket Number and Title.

ADDITIONAL COLUMNS:

- Additional Columns:** A list of available columns including Last Activity By, Last Customer Notification Date, Last Customer Visible Activity Date, Last Tracked Modification Date, Last Workflow Activity Date, Line of Business, Location, Market Segment, and Monitor Type.
- Selected Columns:** A list of selected columns including Time In Current Status (Days), Last Activity Date, and Resource (Primary or Secondary).

Arrows indicate the ability to move columns between the available and selected lists. The 'Last Activity Date' column in the 'ADDITIONAL COLUMNS' section is highlighted with a red dashed border.

2

Create Reports in Your PSA to Identify the Neglected Work

Datto Autotask PSA (continued)

- 6) In Filters, configure:
- 1) Filter 1: Status, Equal to, In Progress
 - 2) Filter 2: Last Activity Date, Dynamic Range, To Date = Today Minus 2 Days, or whatever threshold you decided for the In Progress status. It should look like this:

The screenshot shows a filter configuration window for 'Filter By' with the selected filter 'Last Activity Date'. It features two main sections: 'Starting' and 'To Date'. The 'Starting' section has a dropdown menu and a '#' field. The 'To Date' section has a dropdown menu set to 'Today Minus # Days' and a '#' field containing the value '2'. Below these are 'From Date' and 'To Date' fields with calendar icons.

It would be preferable to filter by Time in Current Status, but that's not available as a filter.

- 7) Set Options and Layout/Size fields as desired.
- 8) Click Save & Close.

Review the service tickets in the grid. These are the tickets that are neglected in the In Progress status.

Repeat the steps above to make widgets for all the other statuses for service tickets.

You can perform similar steps for project tasks. For tasks, Last Activity Date is not available as a column or filter field, but Last Status Change Date is available as a filter field.

For engineers to see their own neglected tickets, add this filter field to each widget: Resource (Primary or Secondary) Is Logged In Resource (User).

3

Keep Metrics for Neglected Work

Since you have reports showing your neglected tickets, now you should track the number of neglected tickets so you can see how your team improves over time.

Set aside a time to record these metrics at the same time every day or week.

In a spreadsheet, record the number of neglected tickets for each status. You may also want to count neglected tickets by ConnectWise board or Autotask queue, or for each technician. This helps you see which statuses, boards/queues, or technicians have the most neglected work and could benefit from the most attention.



4 Incorporate Reports and Metrics Into Your Team Workflows

Just listing neglected tickets or recording metrics won't help you improve your service. You also need to incorporate this information into your management, engineer, and team workflows. Here are some ideas of how to make use of this information:

- **Service managers:** Check the report daily and work with technicians to address neglected tickets.
- **Project managers:** Check the report two or three times per week. Discuss neglected tickets and tasks with project team members and identify next steps to move the ticket forward.
- **Technicians:** Check the report daily and quickly follow up all neglected tickets.
- **Team meetings:** Discuss neglected tickets as a team and make a plan to fix each one. Discuss neglected ticket metrics and changes over the last week or month.

When your managers and technicians quickly address neglected work, you'll see clear improvement in your metrics, responsiveness, and customer satisfaction.



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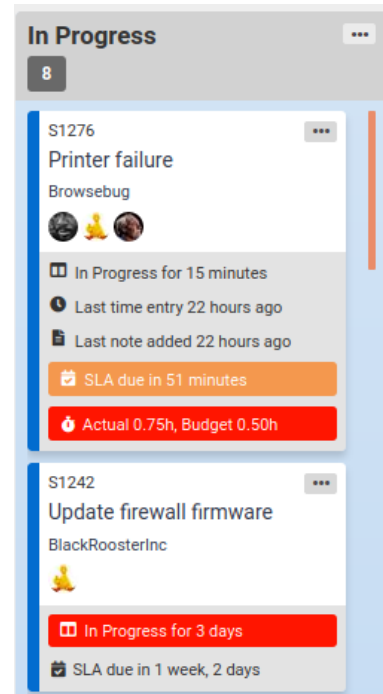
Eliminate Neglected Work Easier and Faster with Kanban Boards

You can reduce neglected work using reporting in ConnectWise or Autotask, but reviewing reports this way is time-consuming and inconvenient. Wouldn't it be better if there was a way to see neglected work all in one place, incorporating different thresholds for each key stage of work, easily accessible in a place that you could work from all day long?

Kanban boards by TopLeft make this possible. Integrating directly with ConnectWise Manage and Datto Autotask PSA, your tickets and tasks are shown as cards in a series of columns that indicate clearly what stage of work each item is at. Each column shows work in one or more statuses, allowing you to watch as it progresses through your pipeline. Each card clearly shows how long it has been in its status, and each column can be configured with a threshold for highlighting work as neglected. You can indicate neglect not just on time in the status but also the time since the last note or time entry was added to the ticket.

Kanban boards for MSPs don't just make it easy to visualize work- they also make it easy to DO the work, because you can drag tickets between columns to change their status, drag between technicians to re-assign, and dispatch and enter time and notes with just a few clicks.

It's never been easier to stop juggling tickets and take back control of your work.



Visualizing the work (and the exceptions) – we have had more meaningful standups/huddles and we have been able to spot outliers that we would have not caught prior to adopting Kanban – the built-in filters/highlights are quite excellent.

Ben Johnson
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Don't spend another day struggling with neglected work! Let us show you how Kanban boards can transform your MSP- visit us at <https://www.topleft.team/schedulecall>