



myITprocess™

V.1

A photograph of a laptop screen displaying lines of code in a dark-themed editor, with the keyboard visible below. The image is framed by a white border and set against a blue geometric background.

Technology Alignment Manager Standards & Training Manual

Your all-in-one guide to creating and managing the proven TAM process that has helped hundreds of MSPs build World Class businesses.



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Table of Contents

The Winds of Change are Changing	3
Beyond MSP: The Next Evolution for IT Providers	3
Introducing the Technology Success Provider	4
Technology Success Culture	5
The Essence of Technology Alignment Manager	5
The Technology Alignment Manager Role	7

The Winds of Change are Changing

The technology market has changed. As small businesses look to outsource IT, more Managed Services Providers spring up. The average seats per customer have increased. The market must keep up with this trend to offer proper solutions at the right price.

Before MSPs went mainstream, IT companies operated on the break/fix model. Reactive service was often sold using pre-allocated blocks of time or billed hourly. Technology consultants would meet with clients to state the obvious: hardware X is broken and it will cost Y to fix it. With the evolution of small business needs, this model no longer worked. Enter the Managed Services Provider, offering proactive support and consulting for a monthly cost. At the time this was the be-all and end-all of IT services for businesses.

But what if there is more? What if the MSP is changing, offering more than proactive support and consulting? Is it possible to improve the business relationship and not only the technology? TruMethods transformed break/fix providers into top-performing MSPs and will lead them in the new frontier. Begin your journey towards the next step in World Class as a Technology Success Provider.

Beyond MSP: The Next Evolution for IT Providers

When a business is break/fix oriented, things are simpler. As long as you keep billing your clients, they keep paying, and you keep fixing, the process works. Reactive service is unforgiving and people dependent; separating from the competition is difficult. A bad week turns into a bad month which leads to a bad quarter and likely a bad year. It soon becomes clear that things have to change. You need to leave the break/fix model and begin the journey to MSP.

The idea of entering the MSP market is to create value for customers by managing technology. This creates a recurring revenue business model providing a monthly stream of revenue. The addition of new tools and features make an MSP more attractive to customers. But the market has yet again changed.

The MSP market was soon flooded with technology companies touting their proactive approach. Adding tools to support the growing number of small businesses was common. Additionally, an increase in end users demands for a higher cost per seat. Remote Monitoring and Management, backup & disaster recovery, and antivirus required more than words on paper; they needed to be an MSP Practice.

The MSP Practice has more focus on specific roles, processes, workflow, and metrics. Both MSP and customer outcomes tie in these items. The customer saw more value in an MSP Practice versus generic proactive services. Service providers began broadcasting how they were better than their competitors. At TruMethods, we gave MSPs some advantages they can add to their MSP Practice. Managing outcomes, 4 Blocks, and 5 Qualities of World Class are examples of how the average MSP elevates above its competitors. Now it's time to begin a new adventure towards Technology Success.

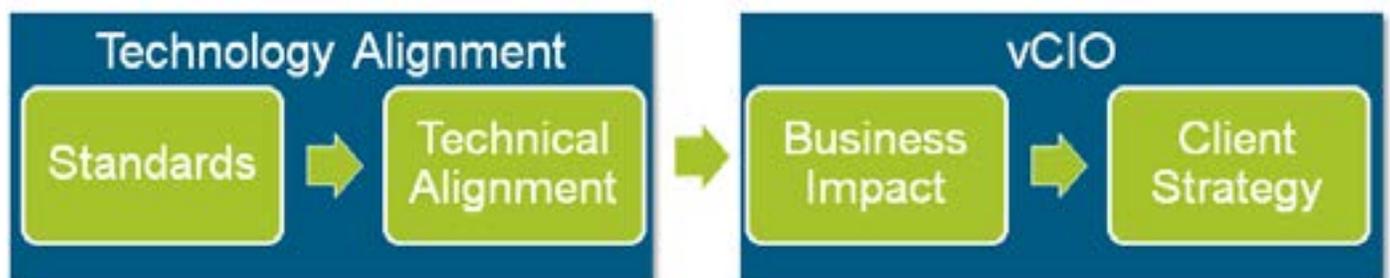
Introducing the Technology Success Provider

The Technology Success Practice (TSP) is the top layer on the business model. The business of break/fix shifted to the proactive management of technology. It has now pivoted to Delivering Outcomes of client business success. Fixing and managing technology is no longer enough and must now focus on the success of the client. Managing outcomes requires four pieces of the practice: Standards, Alignment, Impact, and Strategy. Ongoing strategy with customers will be a business relationship addressing their changing needs.



Building a strategic relationship depends on how customers view your services. If their Selling, General & Administrative (SG&A) costs include IT then it is a generic expense. Every dollar not spent on SG&A is another dollar of profit. To compete in their market, they must perceive technology as a strategic advantage.

A strategic business relationship provides leverage over a customer's technology. The client is desperate to understand how to make technology a functional area. A TSP understands the goals, challenges, and opportunities for building a strategic relationship.



Delivery areas of Support, Centralized Services, and Professional Services have low perceived value. Every MSP in the market has a variation of these areas to call themselves proactive. A TSP is set apart by Technical Alignment and vCIO, the building blocks of Technology Success.

Technology Alignment is performing an objective review of a customer's IT environment. Performing reviews consists of defining standards and aligning customers against them. Creating a Standards Library requires contributions from other delivery areas while a Standards Committee adds, changes, or removes best practices from this repository. A Technology Alignment Manager (TAM) is a dedicated resource to create a one-on-one technical relationship.

Technology Success Culture

A Technology Success Culture defines how customers perceive their quality of support. A positive culture will radiate and make a positive impact on customer satisfaction. There is more to a TSPs Technology Success Culture than vCIO and TAM. Parts of the system will fail without proper balance.

A Technology Success Culture revolves around standards, best practices, and processes. Although a TAM is central to technical alignment, they are not alone. Support Desk, Centralized Services, vCIO, and Professional Services work together to create a World Class culture.

Onboarding is the first step towards customer technical alignment. It uses base-level standards implementation to get clients added to a Professional Services Automation (PSA) system. It also includes deploying remote agents and completing documentation. The onboarding process is not designed to align your customers from day one. It introduces a gradual alignment increase with each onsite visit. Analysis paralysis will set in if attempting standards alignment all at once. When excessive options are available from the start, actions are never taken.

The Essence of Technology Alignment Manager

The TAM Core consists of two items: Math and Process. The Math includes measurable drivers while the process contains priorities, steps, and tasks. The Results are the impact on the client, business, and the person in the role. The Essence is the spirit of the role that ties the Core to the Results.

Measurable Drivers

The math used is for measurable drivers which benefits the customer and TSP. It provides real quantitative data for measuring trends and predicting future results. Management of clients using a numerical value enables simple graphing and easy readability.



- **Clients & MRR Managed:** A manageable number of accounts using the TruMethods process is 18-22. Client size and Monthly Recurring Revenue (MRR) ultimately determine how many accounts to manage. But, the leverage guideline is one TAM per \$70,000 in Monthly Recurring Revenue.
- **Annual Alignment Visits:** A TAM has a set number of working days available and has a certain amount of alignment visits to complete per year. The frequency of visits is dependent on a client's size, scope, and complexity. Complex customers may need monthly visits while others may be quarterly or semi-annual.
- **Completed Categories:** Development of standards using categories can range in scope depending on compliance requirements.

Priorities, Steps, Tasks

Priorities, steps, and tasks make up the other half of the Core. These will define the day-to-day activities included in the role. These non-numeric items develop measurable drivers and not to produce data.

- **Schedule Onsite Visits:** A key aspect of the TAM role is onsite alignment visits. Schedule visits to be onsite and not performed through remote access. Face time with the customer is important for customer success. The size of the client dictates the frequency of onsite visits. They can range from monthly, quarterly, and once or twice per year. It is recommended to schedule onsite visits one year in advance.
- **Developing New Standards:** A vital component to technical alignment is the continued development of company standards. Maintain, update, and phase out standards as technology or a customer environment changes. Development of new standards is most efficient in a group setting. A Standards Committee is made up of other delivery areas within the TSP. These include vCIO, Service Desk, Professional Services, and stakeholders.
- **Documentation:** Keeping track of standards, technology, and processes are important for efficiency. Documentation creates historical records for all changes made in the past. It also maintains a current record of policies, procedures, and technology are in use.

The Essence of the TAM is to assess and align technology. Building a business relationship with customers is not the function of this role. This is not to say a TAM should not have face to face interaction with end-users. Maintaining a close relationship with a point of contact reinforces trust and competence.

A vCIO manages the business relationship and goals of each client. The TAM is instrumental in maintaining the standards library and aligning customers to those standards. TAMs are integral in determining which standards need modification, removal, or addition. A personable relationship imbues confidence between end users and the onsite technician. Customers prefer a resource that can interact on a business level. This is a technical relationship that differs from a vCIO's business relationship. A TAM focuses on standard and technical alignment of the IT environment. They will not perform business impact or client strategy meetings.

Familiarity with an IT environment on a technical level is the TAMs primary concern. It is not their prerogative to present recommendations to decision makers while onsite. Though encouraged to interact with end users, it is through technical means. Presenting recommendations to a decision maker is the responsibility of a vCIO.

The Technology Alignment Manager Role

TAM is an essential core focus of the Technology Success Practice. When the vCIO proposes solutions, the value of those recommendations is dependent upon completed alignment reviews. Knowledge of technology used by customers is necessary to perform a proper evaluation. But, a vCIO must have the ability to translate technical risk into business strategy. A decision maker will likely not understand technical language.

What is Technical Alignment?

Technical alignment breaks down into two parts. The first is developing standards and best practices using a Standards Library. The other is performing assessments to align clients against those standards. Standards and best practices can be the responsibility of a Standards Committee. Group members should be members from other delivery areas to round out the skill set. Examples include vCIO, Centralized Services, and Service Desk. Involving TSP stakeholders like the CEO or other executives provides more business-oriented input. It is beneficial to the committee to include as many roles as possible.

Company standards alignment requires a technical review that occurs onsite. Annual onsite visits depend on client size and technology needs to be determined during onboarding. Technical alignment is not effective without scheduled alignment visits. The Technical Alignment focus is to:

- Develop and maintain technical knowledge of the client environment.
- Perform regular proactive service as a technical lead.
- Be responsible for upholding best practices and reporting recommendations to the vCIO.
- Cut reactive issues by controlling the number of submitted service requests.
- Identify technical risk and seeing technical issues firsthand.
- Be eyes and ears for the vCIO by mastering the environment and making recommendations.

Developing a Standards Library

The first part of technical alignment is maintaining a Standards Library. Without standards and best practices, an onsite alignment visit would not make sense. It would be near impossible to come out of it with usable information for the vCIO. A standard or best practice can be broken down into three individual components.

- **Question:** These should be objective and have a yes or no answer. Questions should not be open to interpretation.
- **Why are we asking:** Why you are asking this question justifies its reasoning to the client. If the customer comprehends the business impact, they are more willing to accept the recommendation.
- **How to find the answer:** Assessments check hardware or software for particular configurations. Rather than assume the TAM is aware of how something works, document steps to complete this task. It is best to cite your source on why you decided on that method of standardization. Include a URL to a manufacturer or vendor page describing the preferred configuration.

Certain aspects of each visit should have a clear definition when performing an assessment. These are concerning what is audited as well as its performance. A standards visit includes the following:

- **Standards should be defined:** Define standards and best practices before the first onsite visit. Manufacturers and vendors often supply best practices for their products. Examples include Windows Server, Exchange mailboxes, or a UPS device.
- **Technology or Compliance:** When developing standards for onsite assessments, focus on technology or compliance. Technology standards include best practices for configuring and monitoring technology. Compliance determines whether the client is within acceptable parameters for private or government regulations. Technology and compliance play off and depend on each other.
- **Elements that should be inspected:** The client is relying on the TSP to assess their technology. They determine what needs improvement and make recommendations to a decision maker. Inspected items are what clients are counting on to keep them compliant.
- **What is considered healthy:** Technology assessments decide what is healthy in a customer's IT environment. Elements of the assessment that are not aligned with standards must generate recommendations to the vCIO. The customer is relying on this information as part of a service commitment to them.

On the back half of TAM is technical alignment. This is the process of assessing customers and aligning technology against defined standards. This part is as, if not more, important than developing standards. Creating a set of standards without performing reviews would be irrelevant in the alignment process. It will be a waste of TSP resources and a severe letdown for clients.

- **Standards are the definition:** Alignment is a process of assessing how a customer's environment is versus how it should be. The core responsibility is marking items aligned or misaligned and passing information to the vCIO. Company standards are the definition for this process. Without them technical alignment is irrelevant.
- **Technical Alignment is objective:** Performing technical alignment of customer's technology is an objective analysis. Standards formatting dictates an answer of 'yes' is the rule and not the exception.
 - Good example: Is the system partition at least 40GB in size?
 - Bad example: What size is the system partition?

Standards, Alignment, and Technology Success

Standards and alignment are necessary to build a successful Technology Success Practice. The vCIO and TAM roles are integral to creating the separation which differentiates you from the competition. Standards and technical alignment will change the landscape of performing assessments.

- Best practices reassure customers of a baseline to compare against when making recommendations.
- Standards will impact all areas of the TSP: Centralized Services, Service Desk, and vCIO. All delivery areas will involve themselves in developing standards for technical alignment. Therefore, reactive and proactive services will affect them.
- The institutionalization of knowledge will create consistency across all clients. Aggregating the knowledge held by each employee into a repository prevents fragmented service. Support and alignment of best practices among clients become consistent.
- Reactive service will be a victim of standards and alignment by reducing noise. Resolving problems that cause reactive tickets is a primary goal of the process.
- Technology Success Providers that provide World Class service are few and far between. Implementing the standards and alignment process is the differentiator from competitors.

Technical Alignment

Standards are the definition of the Technology Success Process. Technical Alignment is the ongoing analysis of a client's technology against company standards. Assessments performed by the TAM mark a standard either aligned or misaligned. It is also their responsibility to add supporting detail to develop more standards.

Alignment Cycle

The frequency of performing alignment must be on a regular schedule. The ever-changing landscape and evolution of information technology demand constant attention. The Standards and Alignment process is never completed and continues to change. A TSP adapts to an alignment cycle as standards change.

- Alignment will change over time and more than expected. Moves, adds, and changes cause the process to be ever-evolving like break/fix issues.
- Check categories on a defined schedule, especially risk-based or frequent failure occurrences. Perform a frequency update if you feel items need to be checked more or less in a given year.
- Discuss alignment with clients to reinforce the importance of their business conforming to standards. Keeping them updated makes recommendations easier to process when they are well informed.
- Use alignment to drive Strategy, allowing the vCIO to focus on business issues and growth.
- Set targets for reviews, analyzing metrics, and determining the completion rate to meet obligations.

Getting Started with Alignment

Like creating standards, finding a starting point for alignment may seem difficult. The trick is to start small and work your way up. The process takes effort to put in place and needs time to acclimate. This is why input from other delivery areas and Standards Committee meetings are important.

- Choose core clients and ensure your relationship with them is in good standing. A client with a strong relationship will support the changes that are coming into effect. Include noisy clients to reduce the reactive support burden on Service Desk.
- Schedule TAM meetings at least one year in advance. Allowing the client to be aware of this obligation stimulates preparedness.
- Perform TAM assessments on site and use a full day. A remote analysis is possible in extreme cases, but the onsite visit shows commitment. A physical presence confirms visual parts of the assessment.
- Keep the client involved and show them what you are doing onsite. Keep the discussion small and talk about your findings. Suggest forwarding more complex items to the vCIO for review.
- Make the client accountable for your findings by discussing the problem. Having a customer aware of the issue transfers liability to them and forces them to take action.
- Provide feedback to the Standards Committee when a standard is not valuable.

Effects of Technical Alignment

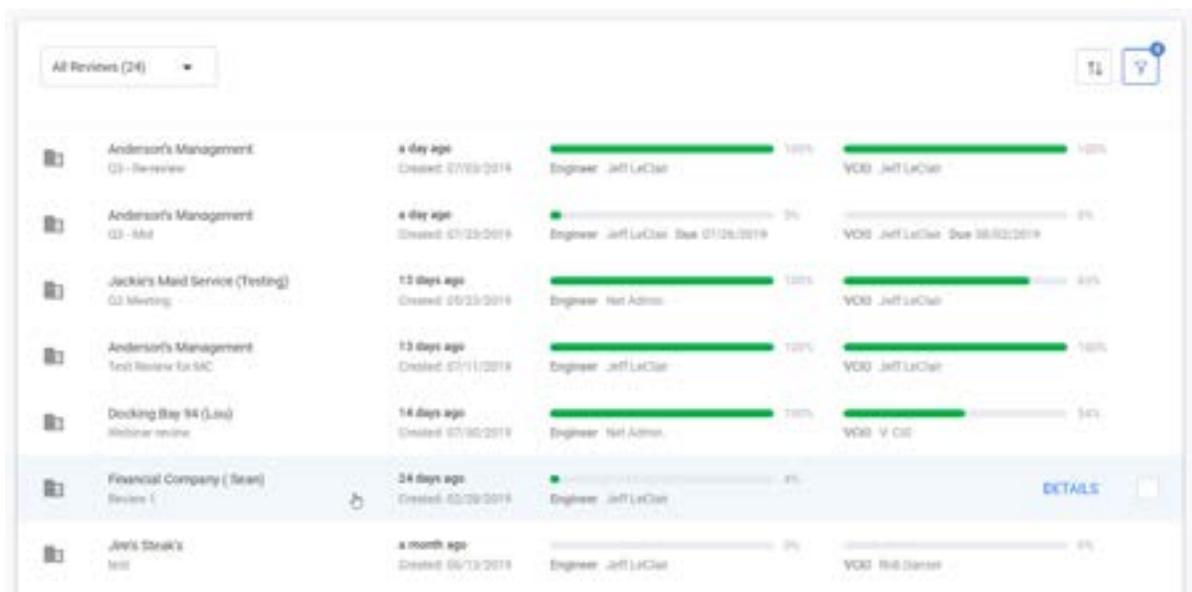
Standards and Alignment does more than reduce noise and increase monthly recurring revenue. The process will make delivery areas more efficient by changing information and workflows.

- Tribal knowledge becomes company knowledge, getting information down on paper. Best practices become standardized and known throughout the company and clients.
- An objective view of technology eliminates the "versus for opinions" - meaning how something is set in its way and not debated.
- The organization of tiny details into something of use. This narrows down the topics for the vCIO to discuss with clients.
- Frees the vCIO to focus on business impact for the customer. Otherwise, the vCIO finds themselves performing job functions other than impact and strategy.

Feedback from TruMethods members describes the success achieved through standards and technical alignment. Implementing the framework and following the Technology Success Process, they have transformed into a TSP. Some have even shared what common components they implemented to deserve such triumph.

- Standards are alive in their organization and are part of the rhythm of daily workflows.
- The Framework streamlines the process and creates accountability.
- Metrics like reviews completed or summaries delivered measured to look for improvements.
- Tags and frequency are of common use in the myITprocess software. A TAM can track standards and completion status.
- Virtual CIO leans on alignment to drive strategy with each client.
- Everyone understands the Essence of the TAM and vCIO roles and how they impact MRR, AISP, and RHEM.

Developing standards and aligning technology is the keystone of a World Class TSP. Standards impact all areas due to institutionalized knowledge and delivering Technology Success. Alignment is how delivering value lowers reactive noise and increases margins.



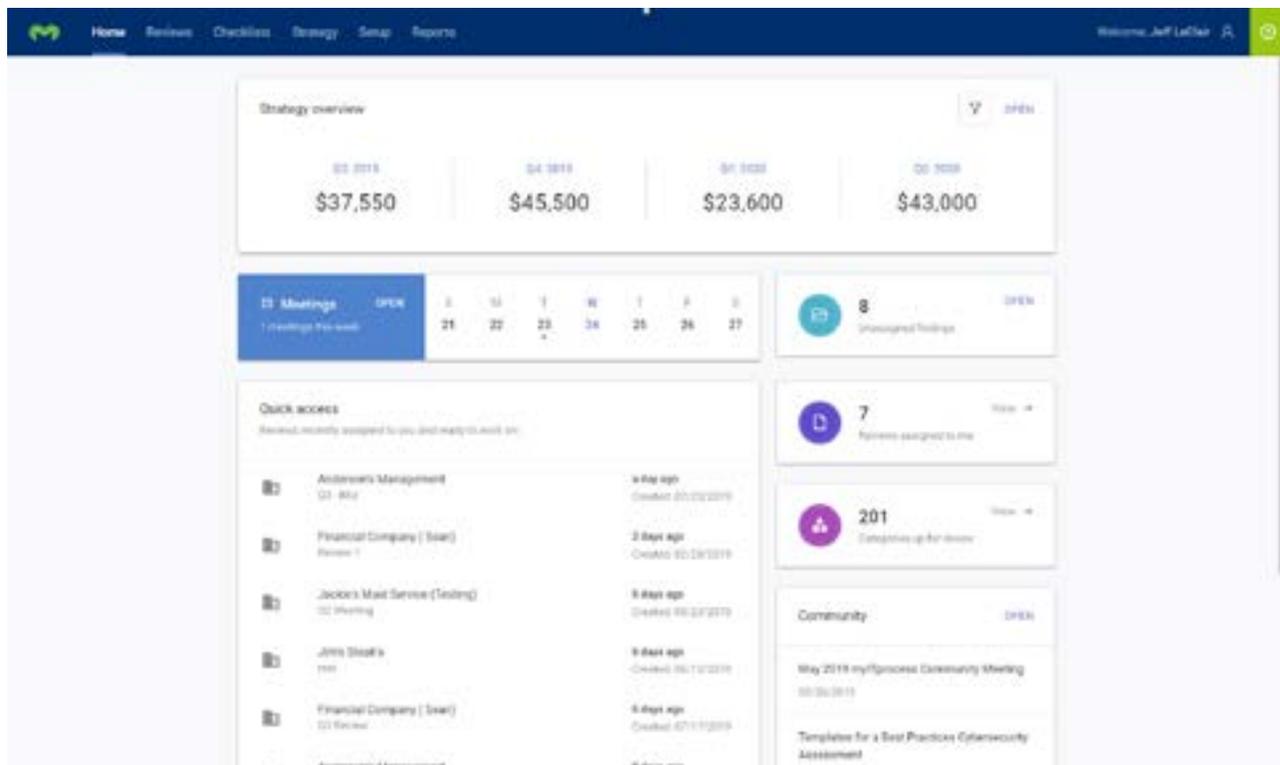
Keep your all your clients in check with the streamlined "All Reviews" page in myITprocess.

Roles and Responsibilities

The TAM has roles and responsibilities like any other member of the services team. It is essential to define their job function to prevent overlapping other delivery areas.

1. Proactive services
 - Alignment against company standards and discovering technical risk is the primary focus. Regular onsite assessments create a proactive approach to servicing technical needs.
 - Verifying Centralized Services tools, monitoring, and configurations are working.
 - Establishing a technical relationship will let the TAM communicate from a hands-on level. TAM interaction gives the customer a heads up on what recommendations they may pass on.
2. Perform regular alignment
 - Have alignment visits on a regular frequency. A common method of determining visit count depends on monthly recurring revenue. A customer paying more may indicate a greater need for frequent alignment reviews. A minimum starting point would be at least once per quarter.
 - Review meetings with the vCIO after completing onsite reviews. Using the findings of a review allows both roles to form a consensus on recommendations.
3. Onsite versus remote visits
 - Scheduled onsite visits are preferable to remote assessments. Building a customer's trust requires face to face contact with end users. Seeing a TAM onsite reassures them the TSP is delivering on their promise.
 - Alignment reviews completed via remote methods are doable. While it is always recommended being onsite, remote work is possible under certain circumstances. Clients are expecting an onsite resource for this type of work.
4. Full days versus partial days
 - A full day dedicated to a customer's onsite assessment is necessary. Undivided attention assures them prioritizing others is not occurring during this visit. Half days short the customer by not allocating enough time to perform an assessment. Using half days to schedule many visits creates a time crunch that will not benefit the TAM or customer.
 - Schedule onsite visits one year in advance. The client is then aware of the TAM's arrival date and time.
5. Reactive Services
 - Complete scheduled reactive tickets as assigned while onsite. Some tickets need an onsite to resolve and it is best to schedule the work while they are there. This will prevent unnecessary onsite visits by condensing them into a single onsite.
 - Perform simple implementations like upgrading software, connecting a phone, or installing a printer. Scheduling small moves, adds, and changes while onsite is more efficient than a separate project.
 - Train end users to use the Service Desk even while the TAM is onsite. Scheduled implementations and tickets are a priority once the risk assessment concludes. Unsolicited issues brought to the TAM may pull them away from other tasks. Showing users how to call the Service Desk will prove they can expect a timely resolution.

6. Develop and maintain technical knowledge of client environment
 - A TAM develops and maintains knowledge of a customer's technical environment. These include the hardware, software, and cloud services. Staying updated provides valuable insight to the other delivery areas.
 - Technical configuration is key to providing proactive services. Well-documenting the configurations of technologies allows for easier implementations or reconfiguration.
 - Business application support and warranty status should be well documented.
 - Keeping vendor relationships active allows the TAM to contact the right vendor at the right time. Bypassing general support when necessary and accessing top-tier support is more efficient. A dedicated account manager or technician with a vendor gets issues escalated faster.
 - Daily technology use is fundamental to the customer's business success. Using technology provides recommendations to merge, expand, or cut waste.
7. Create a document and information repository to consolidate knowledge. Document management simplifies updates and accessibility for team members. All service delivery areas benefit from a central repository.



Every role can find value on the new myITprocess Home Page. Track project budgets, upcoming meetings, assigned reviews and new community posts all-in-one place.

A Day in the Life

When a TAM goes onsite, what is the process like? What happens first and what happens last? This section will give a short breakdown of what a typical day looks like for a TAM while onsite.

1. Morning meeting with the client (15 minutes)
 - A short meeting should take place to cover basic items before the TAM begins their daily assessment.
 - What items are on your list that you need to bring up with the decision maker?
 - What items are on your customer's agenda that must be mentioned?
 - Are there any other discussion points to mention while the morning meeting is taking place?
 - Discuss what you are there to accomplish and which tickets need completion.
 - Help the customer navigate Service Desk requests, ongoing projects, and recommendations by the vCIO during their last meeting.
2. Complete proactive tasks
 - Complete your list necessary for standards alignment by finishing checklists and best practices.
 - Perform any maintenance items required to stay proactive.
 - Check Centralized Services tools to ensure they are functioning and test if necessary.
3. Complete reactive tasks
 - Complete scheduled tickets while onsite.
 - Complete scheduled moves, adds, and changes while onsite.
 - Complete any reactive tasks at the conclusion of the full alignment review.
4. Afternoon meeting with the client
 - Give a summary of your work completed to the client.
 - How much of the assessment was completed?
 - How many scheduled tickets were completed?
 - How many moves, adds, and changes were completed?
 - Note which maintenance was completed.
 - Inform customers of any unresolved items moved to the service desk for follow up.
 - Tie up any loose ends, answer questions, and confirm next onsite visit day and time.

Action Items & Follow Up

Once the alignment visit concludes, there will be action items to address. Though the TAM is technical and able to solve issues onsite, their priority is the alignment review. The delegation of these action items goes to the appropriate delivery areas.

Virtual CIO

- Have a post-meeting follow up to discuss the alignment visit and pass information discussed with end users.
- Make recommendations for misaligned technical items.
- Note which technical items were addressed while onsite.
- Recommend the addition, removal, or updating of standards.

Service Desk

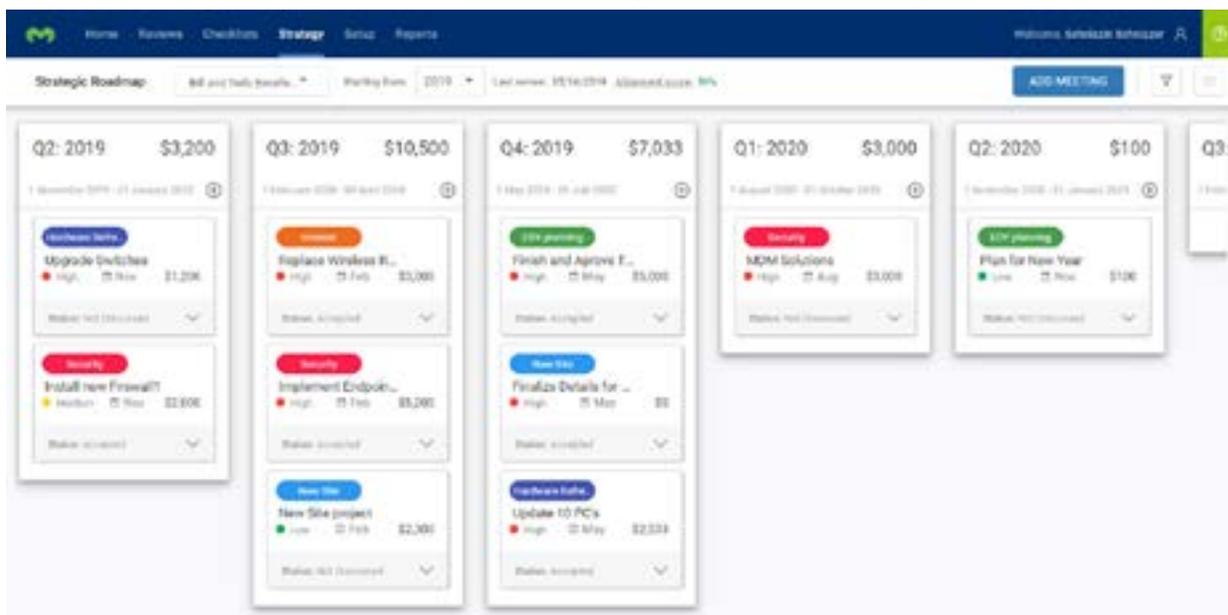
- Discuss technical items completed and those handed to Service Desk.
- Create tickets for issues to hand off to Service Desk and include excessive notes about the problem.
- Ensure end users are aware of the Service Desk for help while the TAM is onsite.

Professional Services

- Pass along unresolved issues from ongoing or past projects that need completion. Some issues related to past projects may be delivered to the Service Desk.
- Transfer knowledge from standards alignment to Professional Services as needed.

Centralized Services

- Verify RMM tools deployment and configuration to an established set of standards.
- Identify and recommend resolutions to misaligned RMM tool configurations.



Your vCIO can take all technology recommendations and plan them out across quarters with the Strategic Roadmap feature in myITprocess.

Why this is Important

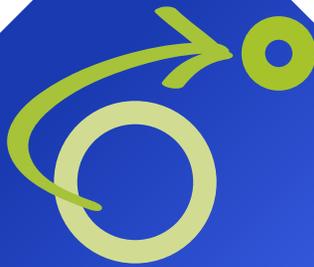
It is difficult to explain the functions of the TAM without repeating its importance. From what we know of the Technology Success Practice, the TAM is a key piece and without it, a TSP is like everyone else. To summarize why this role is important:

1. **Drives down reactive support:** A proactive role using technical alignment keeps reactive support low for Service Desk and other service delivery areas. An increase in reactive support weighs on all delivery areas in the company.
2. **Strong relationship with the client:** Maintaining a strong relationship with clients enables trust in your organization. This creates leverage, making them susceptible to recommendations made by the vCIO. An insufficient trust will cause a client to be defensive and not invest in upgrades.
3. **Intimate knowledge of the environment:** Understanding a customer IT environment configuration is integral to the TAM role. Since the TAM interfaces with the client during visits, knowledge of the environment is necessary to quarterback the information to responsible parties.
4. **True vCIO will not exist:** To deliver vCIO as intended, this role must operate and adhere to the development of standards and best practices. Recommendations are generated, handed to the vCIO, and business strategy takes over.
5. **Differentiates you from competition:** When you remove the TAM and vCIO roles, Centralized Services, Service Desk, and Professional Services remain. The latter three are services that all MSPs offer and do not separate one from the other. The TAM role adds value and stands out among competitors. This shows potential and existing clients the importance of World Class.

Reframing (changing your client's frame of reference)

Before you reframe your clients, there are some key items to decide on before getting all customers, and your own organization, onboard with these changes.

- Assign resources to clients and keep them assigned for consistency. The same TAM assigned to a customer for every visit creates a consistent rapport with the client. The TAM learns and retains all knowledge about a customer's environment. The client then has the opportunity to remain comfortable with their onsite technician.
- Do not worry about defining all technical standards before visiting customers. Create standards and change them over time. Isolate a handful of standards and increase the number reviewed with each visit. Leverage the skills of other delivery areas and team members for creating standards. Every delivery area affects the outcome of standards alignment and must remain involved.
- Schedule proactive time one year in advance, giving the customer ample time to plan. Preset dates allow you to manage resources if this information is known ahead of time.
- The vCIO and TAM should meet on a recurring interval and determine a schedule. Business needs will dictate a frequency that is comfortable for both parties. Both roles should maintain close communication since they develop client strategy together.
- Perform technical alignment reviews on a set frequency. Aligning customers against set standards is not a one-time deal. It is an ongoing task of keeping items in check and passing information to the vCIO. Determine the frequency that best fits the client from their needs.



TruMethods was launched nearly 10 years ago by industry leader Gary Pica with the purpose of sharing a proven framework to help MSPs achieve more recurring revenue sales and industry leading profitability. TruMethods combines training, community, software and peer to help MSPs reach World Class results. Nearly 20% of the Channel Futures 501 are powered by the TruMethods Framework.

INTERESTED IN BECOMING A MEMBER?

Visit our website at
www.trumethods.com



myITprocessTM

Today's MSP marketplace isn't about just providing products or services. We've built the software that offers your clients value they can't afford to lose by providing a strategic outlook on their business. Unlock the power of myITprocess and combine standards, alignment and strategy to supercharge your MSP.

WANT AN EXCLUSIVE LOOK?

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