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AUTOTASK WHITE PAPER  
for Small and Medium-Sized Businesses

# The “Co-Managed” Service Desk

Strategic Outsourcing to Maximize the Value of Your  
Internal IT Resources

WRITTEN BY

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**Autotask**<sup>®</sup>  
Makes your IT business run. Better.<sup>SM</sup>

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*'With the right outsourcing, companies can free up their resources and meet the challenge of growth head-on... In addition to reducing risk, outsourcing technical support frees up other internal resources needed for growth.'*

ITWorld, May 5, 2009<sup>1</sup>

## Introduction

The vast majority of businesses today are dependent on technology. When your computers, networks, email, servers, or phone systems aren't working properly, your operations either slow to a crawl or can stop entirely. Whatever your core business, once you've come to depend on the efficiencies these systems deliver, downtime just isn't an option.

As the owner or manager of a business that relies on technology, your three options for servicing, supporting, maintaining and repairing your systems are: (1) dedicate internal resources to these functions; (2) outsource them to a technology service provider; or (3) a combination of the two. All three options have their pros and cons.

### Your Internal IT Resources

#### **BENEFITS:**

Having internal IT resources has tremendous advantages. You have complete control over what projects are done, and when. You have someone on premises during business hours to support your staff and equipment. And, importantly, you are able to assign other tasks to your internal resources during their "downtime" when systems are running smoothly.

#### **CHALLENGES:**

But, in today's economy, it is nearly impossible to rely 100% on internal resources to support the growing technology infrastructure of most companies. As each day goes by, your technology infrastructure gets more out-of-date. Software needs upgrading, hardware needs replacing, networks need reconfiguring and new solutions become available to drive your business forward. On top of all that, in order to make the most of your investment in technology, your staff needs to be supported in using it all. Demands on internal IT resources are becoming more intense, just at the time when it is becoming increasingly difficult to justify any spending that adds to company overhead. That is why the vast majority of companies do not have all the internal resources necessary to be completely self-sufficient in the area of technology support.

In addition to economic considerations, there are also the exposure, risk and volatility associated with staff turnover. It's a fact of business that good employees are hard to find and harder to keep. Career ambitions, changes in personal situations and other factors contribute to one of every four IT staff changes each year. Often, even low and mid-level staff carry out the door with them an enormous amount of institutional knowledge that is undocumented and locked in their heads, creating potentially large disruptions in business operations.

## External IT Resources

### BENEFITS:

Outsourcing is the alternative, and a large number of businesses – particularly those with fewer than 10 employees – rely almost exclusively on external IT service firms to support their systems. Relationships run the gamut from simple “break-fix” (where the service provider is called in, as needed, when something needs to be repaired, replaced, or upgraded), to a “managed services” relationship (where the service provider functions as the de facto IT department). The advent of highly sophisticated monitoring and remote remediation tools allow service providers to effectively support their customers in a cost-effective fashion.

Another benefit of outsourcing is that it provides you with much greater flexibility over the level of service and support you need, and the ability to contain your costs. In addition, you will generally have access to more seasoned and experienced resources that are current on the latest technologies, and, importantly, you’ll have assurance that your systems and processes will be documented in a manner that will ensure business continuity.

### CHALLENGES:

For many companies however, the problem with complete reliance on external IT service resources is cost. Service firms need to charge a premium for the people they put to work for you, so they can pay those people a fair wage, cover the associated overhead and make a profit on top of that. The simple math is that if you require a full-time technician from an outsource service provider, you may find your internal service needs exceed your budget. This is why so many companies end up with a combination of internal IT resources supplemented by outsourced service providers.

## Combined Internal and External IT Resources

Often, especially in smaller companies, the internal IT resource is a low- to mid-level “jack of all trades” who can handle most routine support requirements, simple repairs, upgrades and installs. These same companies frequently rely on external IT resources for larger projects, support of specialized applications, IT consulting, after-hour support, coverage for remote offices, and trouble-shooting more complex problems.

As businesses grow, their significant investment in – and dependence on – their IT infrastructure increases and they are likely to expand the internal IT resources responsible for maintaining those systems. Perhaps moving from reliance on a part-time administrative person to a full-time technician, and later, adding a more senior person to the team. The larger the organization becomes, the more likely it is that their IT infrastructure has evolved into a core company function with a recognized and budgeted “IT Department.”

But, for many of the reasons noted above, even the largest companies with substantial internal IT resources still outsource some of their IT services... anything from routine maintenance, Level 1 support and network management, to consulting and special projects. By handling internally those IT functions that maximize utilization of your IT staff and selectively outsourcing functions that are more cost-effectively handled externally you can have the best of both worlds. And, critically, as your business grows, staff changes and technology evolves, you will have maximum flexibility to adjust and shift work between your internal and external IT resources to control and optimize your technology investment.

But, not all IT service providers are well positioned, willing or able to work effectively with your internal IT resources in a flexible, positive and collaborative relationship.

That’s what this white paper is all about.

*'[Outsourcing] deals typically yield 15-20 per cent savings, sometimes more...For many, the point of outsourcing is to gain access to technical skills they can't afford to hire full-time, so managed services is the answer.'*

The Globe and Mail; May 5, 2009<sup>2</sup>

## Assessing Which IT Functions Can Be Outsourced

In addition to cost savings, selective outsourcing can provide access to specialized IT expertise and a rapidly-growing number of businesses are strategically partnering with external IT service providers to collaborate on select IT functions. But, not all functions are right for outsourcing.

The specific factors you use to determine which functions are best outsourced – and which are better handled internally – will vary from company to company. Your industry, business practices, growth stage and company objectives will shape your decision, but so will the size, mission and technical skills of your internal IT staff.

A hospital, for example, may choose to outsource server monitoring, desktop service calls and similar tasks, leaving their level-three engineers and technicians free to maintain, upgrade and repair core patient-care systems and equipment. Similarly, a mid-sized law office may want to keep responsibility for their case-management systems in-house, where a hard-goods manufacturer may want to focus on their MRP, ERP and logistics systems and outsource everything else.

As you assess the various IT functions you handle internally, consider which of those most closely align with your business strategy and which fall within the core competency of your IT staff and of your organization.

Here are some questions to consider when evaluating different IT functions:

- Does the function directly contribute to your organization's growth, position or profitability?
- Does the function provide a differential benefit in your market or relative to your competition?
- Would outsourcing the function negatively affect your bottom line or would it generate savings?
- Even without direct savings, would outsourcing the function have other positive benefits, like improving overall quality or service levels?
- Conversely, will outsourcing the function eliminate or significantly reduce confusion and distraction and allow your internal IT staff to focus on core activities?

The point of this exercise is to determine which IT functions are critical success factors for your business and aligning your internal and external IT resources to support them.

Now that you're in a position to objectively assess which services can be strategically outsourced, how do you select the best vendor?

*‘Smart executives leverage the IT services provider landscape not merely to manage technology “plumbing” but also to profoundly affect business performance.’*

Paul Roehrig, Forrester Research  
December 2, 2008<sup>3</sup>

## Evaluating External IT Service Providers

Strategically outsourcing a portion of your IT functions requires collaboration and coordination between your internal and external IT resources. After all, the purpose is to maximize and augment your internal IT capabilities, not contract them out. That’s why it’s so important to choose a partner who can effectively ‘co-manage’ your IT services issues and work seamlessly with your internal staff.

If you haven’t investigated external vendors in a while, you’ll find that the enabling technologies employed by leading IT service providers have evolved dramatically in recent months. New service delivery options, like the *co-managed service desk*, *software-as-a-service* and *cloud computing* can offer tremendous value, efficiencies and scalability when correctly employed. Most importantly, they offer unparalleled opportunities to select, partner and collaborate with external IT service providers.

### The Co-Managed Service Desk

Traditional help-desk software provides a simple way for internal IT staff to accept, manage and track maintenance and repair issues or ‘tickets’. These applications are useful for organizing and responding to routine service issues in-house, but new technology has enabled the co-managed service desk – a platform that not only offers robust internal IT service-desk functionality, it creates direct linkages between internal and external IT resources so that the responsibility of managing IT functions can be shared efficiently.

### Software-as-a-Service

Software-as-a-Service (SaaS) refers to enterprise-class software delivered to and accessible by end-users over the Internet. Applications delivered as SaaS eliminate the need for internal IT staff to provision and configure individual desktops and devices, and end-users are always assured of using the most recent version available. In addition, SaaS typically avoids the need for large, up-front investment and keeps ongoing costs predictable.

### Cloud Computing

The word ‘cloud’ is a metaphor for the Internet and ‘cloud computing’ refers to data and applications accessed through web browsers. Applications that are available ‘in the cloud’ are easily accessible, virtually maintenance free (from an internal IT perspective) and can extend your existing IT capabilities. As they relate to the selection of an external IT service provider, collaboration ‘in the cloud’ gives you the ability to work with anyone, any time, and allows your IT technicians and engineers to access critical applications from anywhere – in the office or on the road.

Regardless of the particular functions and activities you choose to outsource, at the end of the day, there are three essential criteria that everyone wants when hiring an outside service provider:

1. Someone who knows what they’re doing.
2. Someone who will keep their promises.
3. Someone who will bill you fairly.

This white paper identifies seven key attributes that you should evaluate when considering collaborating with an external IT services partner. If you can get satisfactory answers to your questions in these areas, the odds are overwhelmingly in your favor that you will have an excellent experience with your chosen IT service provider.

Let’s explore in detail how those key attributes can affect your choice of an external partner.

*'Well-run [internal] IT shops typically have strong vendor management, including a good understanding of the obligations, flexibility and strategic value of vendor contracts...'*

CIO News, February 5, 2008<sup>4</sup>

## 7 Key Attributes of the Ideal External IT Partner

### Key Attribute #1: Competence, Range of Expertise and Availability

Of course, the first and most important consideration when selecting an external IT service provider is determining the depth of their technical expertise – *especially in those areas that are not core-competencies internally* – and assessing their experience and level of competence in the specific functions you wish to outsource. Do they have the training, the talent and the experience to take care of your specific needs today – and will they be ready and able to handle emerging technology and trends tomorrow?

Among the questions you should ask are:

- What training or certifications do you have to work on my IT systems?
- What experience do you have in working on those systems?
- What other systems and technologies are you certified in and/or have experience with?
- Can you provide references to similar organizations that you have successfully worked with?
- How fully utilized is your technical team? Do you have the bandwidth to serve me?

Note: Many IT service providers have difficulty answering this last question on staff utilization. Typically, this is because they do not have in place the necessary management systems for them to know with certainty the level of utilization of their technical staff. They may have a vague sense that they are “very busy” or that they have “some bandwidth,” but in truth they can’t say with any certainty. Since the availability of competent resources can be critical, you will want to pay special attention to this area.

### Key Attribute #2: Flexibility & Collaboration

By definition, selective outsourcing requires effective and efficient collaboration between your internal and external IT resources. Do they have the flexibility and willingness to work with your organization in a way that makes sense for you? This is particularly important when you are strategically outsourcing to supplement internal IT resources for critical functions and when you need to collaborate on complex projects. Among your key concerns will be:

- How easy it is for me to assign work to you?
- Can I track your progress on tickets and issues that have been sent to you in real-time?
- Do you offer Service Level Agreements (SLAs) for critical services?
- How do you track compliance with the terms of your SLAs?

*'Companies need to be on guard for fluctuations in demand on their IT resources. Sudden increases in load must be handled swiftly and, if possible, on-demand. In-house options range from being underprepared to over-prepared, but if you have a partner with vast resources, virtually any demand need can be met with aplomb.'*

Tech News World; March 27, 2009<sup>5</sup>

### Key Attribute #3: Notifications & Accessibility

One of the most important reasons to hire an IT services provider is to prevent critical systems from breaking – and to fix things when they occasionally do – regardless of where or when that happens. If your goal in outsourcing IT services is to provide support and mitigate risk after business hours, for remote locations or employees or to provide additional capacity when your internal IT staff is overwhelmed, some of the most critical questions you can ask are:

- How do I notify you when I need immediate help with a key issue?
- What happens if your staff is already fully engaged?
- What happens if something goes wrong after business hours?
- Can you service my remote offices and/or employees?
- What happens if we need help with a piece of equipment you don't generally support?
- Do you have your own extended network of service providers?

Ask for, and make sure you receive, complete details on how you actually make a request for help. Will you be required to place a phone call to their help desk? Do you have to send an email? Or, do they have an online portal where you can request assistance and track their progress?

### Key Attribute #4: Ongoing Communication

The importance of connectivity can't be overstated. The ease and effectiveness of your communications with your outsource partner will have ramifications throughout your relationship. Top providers will offer a web-based platform that allows 360-degree, 24/7 communication between your internal and external IT resources. They should also provide a portal that your employees can use to submit and monitor service issues directly. This not only increases service delivery speed, it can have a dramatic effect on overall employee productivity.

Today's best systems do more than facilitate seamless communication, they actually automate significant portions of the IT services workflow. For example, they can recognize and triage incoming service requests by issue type, time of day (after regular business hours, for example) and other factors, and assign them, automatically, to the appropriate internal or external resource. The goal is to ensure maximum access, visibility and efficiency in your overall service delivery process.

Ask your provider to describe their communication platform in detail. Be sure to pay special attention to the issues of employee access and workflow automation. After all, any system may work well at 11 am on Tuesday morning, but you need it to know works just as well at 7pm on a Friday evening.

*'As more companies feel the effects of the recession...A new blended concept has emerged within the managed services realm in the form of co-sourcing – a service performed by both internal and external resources.'*

TechNewsWorld; March 27, 2009<sup>6</sup>

## Key Attribute #5: Resource Allocation

The real challenge of selectively outsourcing portions of your IT services is coordinating, assigning or moving work between your internal and external resources as needed. Fortunately, the advent of the co-managed service desk has created a new paradigm for sharing responsibility for IT services delivery. It is now possible to seamlessly distinguish between IT functions, issues and sub-issue types and create workflows that automatically assign work to the right resources. For this reason, it's important that you choose a provider who has the systems in place to support the co-management of these services. Here are some questions you should ask:

- Do you have a system that supports the shared responsibility for IT service issues between my staff and yours?
- Can your system automatically distinguish between those issues and assign them accordingly?
- Do you have a system that provides real-time, two-way communication between my internal IT department and your service desk or dispatcher?
- Does your system provide a way for my employees to directly submit service issues?
- What happens when one of my employees submits a service issue?

## Key Attribute #6: Escalation

Escalation is really the follow-on to resource allocation, and how it's handled is particularly important whenever the scope of a problem increases unexpectedly. You need to know that your service provider has their own internal process for escalating issues that don't meet critical thresholds or deadlines. And, you need to know that they have a solid communication loop with you so that they can be brought in quickly if the situation warrants it. Ask them:

- What happens if a critical issue isn't resolved within the time frame we agreed upon?
- What happens when we need extra help with a critical issue?
- How do I escalate an issue to you?
- How do I track progress on escalated issues?

Leading providers will use automated systems with built-in escalation and workflow rules to make certain that service requests, deadlines and alerts do not fall through the cracks. The best will have a system that gives you complete visibility into the entire process and allows you to escalate your own issues directly to them when your own staff is over-committed or when you run into complex issues.

*‘...the key question that all CIO’s should ask is, ‘should I invest time, money and energy into managing remedial maintenance or should it be outsourced to a company that specializes in the business and has the necessary infrastructure to manage the end-user environment.’*

Computer World; September 22, 2007<sup>7</sup>

## Key Attribute #7: Tracking & Reporting

Now that you’ve narrowed the pool of potential partners down to those who can provide the IT services you need, where and when you need them, you’ll want to make sure you’re in a position to refine the process and make improvements as you move forward. To do that, you’re going to need information.

The most highly-regarded IT service vendors can easily produce detailed issue and resource utilization reports because they’ve invested in the software, processes and infrastructure that allows them to track every aspect of their business. Not only do these reports help them maximize the value of their own internal resources and manage their business more profitably, they document compliance with their service level agreements and allow for more accurate billing.

Just ask to see a typical report. It should clearly detail and summarize a range of service parameters, including exactly what work was done, by who (the internal versus external IT resources), when, and how long it took. Assuming they can deliver such a report, they’ll be happy to provide it. If they are unable or unwilling to, you should probably continue your search.

## Pulling it All Together

The more critical your IT systems are to the operation of your enterprise, the more important it is that you have the ability to strategically outsource to, and partner with, the right external IT services provider. Selecting the best firm to work with may seem daunting at first, but, if you apply these seven attributes to your evaluation process – and ask the critical questions – you’ll find your choices quickly narrowed down.

While our experience has shown each of these attributes are key to creating an effective working relationship with an external IT services vendor, you can shorten the search process considerably by first identifying candidates who can offer a fully-featured co-managed service desk. Why? Because the availability and provisioning of a robust, purpose-built platform for co-managing your IT service issues will go a long way towards satisfying many of the key issues you need addressed.

On the following pages you’ll find a questionnaire you can duplicate and use when evaluating potential IT services partners. You will also find information about Autotask Corporation and Taskfire™ by Autotask, the world’s first co-managed service desk platform for organizations with internal IT resources.

Because the service desk platform is directly tied to the service provider you chose, Taskfire can only be purchased from your service provider. If you have an existing relationship with an IT service provider who does not yet offer Taskfire, direct them to [www.taskfire.com](http://www.taskfire.com) and have them apply to become a Taskfire Authorized Partner.

## Appendix A

## Co-Managed IT Services Provider Evaluation Form

### Competence & Availability

1. What training or certifications do you have to provide me with a co-managed IT platform?

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2. What experience do you have working on those systems?

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3. What other systems and technologies are you certified in and/or have experience with?

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4. Can you provide references to similar organizations that you have successfully worked with?

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5. How fully utilized is your technical team? Do you have the bandwidth to service me?

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### Flexibility & Collaboration

1. How easy is it for me to assign work to you?

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2. Can I track your progress on tickets and issues that have been sent to you in real time?

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3. Do you offer Service Level Agreements (SLAs) for critical services?

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4. How do you track compliance with the terms of your SLAs?

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## Notification & Accessibility

1. How do I notify you when I need immediate help with a key issue?

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2. What happens if your staff is already fully engaged?

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3. What happens if something goes wrong after business hours?

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4. Can you service my remote offices and/or employees?

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5. What happens if we need help with a piece of equipment you don't generally support?

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6. Do you have your own extended network of service providers?

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## Ongoing Communication

1. Please describe your communications platform...

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2. Does it support real-time, two-way communication between your office and our internal IT department?

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3. Does it include a way for employees to submit and monitor service issues directly?

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4. Can it automatically triage and/or assign service tickets based on parameters we establish?

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## Resource Allocation

1. Do you have a system that supports the shared responsibility for IT service issues between my staff and yours?

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2. Can your system automatically distinguish between those issues and assign them accordingly?

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3. Do you have a system that provides real-time, two-way communication between my internal IT staff and your service desk or dispatcher?

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4. Does your system provide a way for my employees to directly submit service issues?

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5. What happens when one of my employees submits a service issue?

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## Escalation

1. What happens if an issue isn't resolved within the time frame we agreed upon?

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2. What happens when we need extra help with a critical issue?

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3. How do I escalate an issue to you?

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4. How do I track progress on escalated issues?

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## Tracking & Reporting

1. Can you provide me with a sample of the type of report you typically use to track the services you've delivered and/or co-managed with one of your clients?

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## Appendix B

# Taskfire™ by Autotask

Taskfire is a powerful, hosted service desk and ticket management system your staff can use to

- Improve internal IT service delivery
- Provide just-in-time access to needed resources
- Ensure coverage for remote offices and employees
- Reduce complexity and costs of multiple vendors

Taskfire provides your IT team with a fully-integrated platform for accepting, triaging, assigning and resolving service issues – and gives your employees a simple, web-interface for submitting issues and tracking progress. But, what separates Taskfire from every other internal help desk system is the direct link to your preferred external IT service provider.

Taskfire gives you complete control over what issues get sent to your service provider and when. Individual tickets can be automatically routed using the powerful built-in workflow automation engine, or manually escalated. Either way, you're virtually guaranteed immediate access to additional IT resources – where and when you need them – without managing multiple vendors or adding to your headcount.

### Taskfire Features

- World-class Service-Desk Software your staff can use to create, manage and resolve all your IT service issues
- Web-Based Employee Access Portal giving your employees the ability to submit and track service requests, and more
- Unlimited Flexibility to Share Service Requests with your outside IT service provider, manually or automatically, according to the workflow rules and priorities you define
- Powerful Workflow Automation Engine to speed service, eliminate redundancy and increase accountability.
- Comprehensive Service-Activity Reports

### Taskfire Benefits

- Coverage outside of your normal business hours
- Access to reliable experts and resource when you need them
- Added manpower during peak demand or to help with complex issues
- Secure “institutional IT knowledge” that otherwise resides with individuals
- Ability to provide on-site support to remote offices and employees

Taskfire's unique, co-managed platform provides unlimited options for sharing and coordinating workflow between your internal and external IT support resources to ensure there's never a gap in your coverage.

### Automatically route issues – internally or externally – based on any parameters you set.

At the heart of Taskfire is a powerful workflow engine that allows you to predetermine how specific types of service issues will be handled – and by whom. Automatically. All service tickets from your employees come into your Taskfire system, and then can be automatically assigned to any resource – whether a specific tech on your staff or your service provider -- based on the issue type (i.e. printer problem vs. network server), location (i.e. corporate headquarters vs. remote sales office), time of day (i.e. business hours vs. after hours), and more. You can even establish automatic escalation rules for more complex projects. Or, you can also manually assign, escalate or share tickets at any time.

## Taskfire™ by Autotask (continued)

### Manage and administer user types to control access to your service desk

Taskfire creates a secure, private internal service desk for your IT staff – and an integrated web-portal that other employees can use to submit and track IT service issues for resolution. You control which employees have access to both the Taskfire service desk module and the employee portal and control their level of access. For example, you can grant a technician the ability to work on, edit, complete and escalate service tickets, while only your Taskfire Administrator can manage your configuration settings.

### Automatically send updates on mission critical IT initiatives

With Taskfire, nothing falls through the cracks. Ever. Taskfire provides complete, end-to-end visibility into your IT service issues – from automatic notification of every new ticket created to at-a-glance visibility into ticket status and resolution. Taskfire's workflow rules can even be set up to automatically send updates whenever a ticket is escalated or when there's a significant change in its lifecycle.

### Cover unplanned gaps with the Out-of-Office feature

Imagine a number of critical IT issues cropping up at once, just when your one internal IT staff needs to leave unexpectedly. Taskfire's Out-of-Office Assistant allows you to flip a switch to temporarily override your request-type rules and auto-escalate all new tickets directly to your service provider. This saves having to manually change (and reset) individual workflow settings to meet a temporary need, and you can even exempt low-priority issues that wouldn't be escalated under any circumstance.

### Use the integrated Knowledgebase to lower service delivery costs.

Taskfire's includes a built-in Knowledgebase consisting of individual articles, organized by category and sub-category, to help you resolve common IT issues more quickly and establish best-practices. Populated by your IT service provider, Knowledgebase can reduce the time and expertise needed to research and resolve certain issues and help lower your overall costs.

### Integrate all of your key external vendors

Taskfire's workflow engine is so flexible you can integrate other external vendors as well. Just define a new request type and workflow and service tickets related to telephony issues can be automatically routed to your VOIP provider, and tickets related to your power system can be sent automatically to the appropriate utility.

Taskfire™ by Autotask is available exclusively through a Taskfire Authorized Partner. For more information, visit [www.taskfire.com](http://www.taskfire.com)

## Appendix C

### About Autotask Corporation

Autotask Corporation is the leading SaaS provider of hosted service management tools that allow VARs, Managed Service Providers and other IT service professionals to organize, automate, and better manage their businesses. Available anytime, anywhere over the internet with no downloads, Autotask software helps IT service professionals to streamline business operations, capture more billable hours, and collaborate virtually with anyone else in the IT industry to maximize profits.

More than 25,000 IT services professionals rely on Autotask software every day to help their IT services businesses run. Better.

For more information about Autotask, its solutions, customers and latest developments, please visit [www.autotask.com](http://www.autotask.com) or call Autotask Corporation at 1.518.720.3500

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## Appendix D

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