



teammetallogic®
IT support that speaks your language

The Partner Manual

Your essential guide to getting amazing service & support from your Strategic IT Partner.



Mike Parfitt

 teammetallogic.com

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A Quick Note From Mike

Hello!

I'm Mike Parfitt, Founder & CEO here at Team Metalogic, and I lead your new outsourced IT team. I just wanted to introduce myself and the team personally and let you know that we're really excited to start helping you get the most out of your technology as your new strategic IT partner!

So, our mission is simple...

We're changing the way people think about outsourced IT and telecoms. Taking confusing tech speak and translating it into plain English. Keeping your business running with consistent, excellent service, doing what's best and never taking shortcuts.

Improving efficiency and saving you money.

You might think it's weird, but we honestly wake up every day excited to help businesses like yours better use all the innovative technology that exists out there!

As part of that, this short guide will arm you with all the information you need to get the most out of working with us.

I encourage you to take 5-10 minutes to read through it now so that when you do need our help – you'll know how to best get it!

We're looking forward to working with you!



Mike Parfitt

Mike Parfitt

\ How Can I Get Support?

The first question you might have when working with us is.. **How do I Get Support**, so here's our recommended ways:



Using the Partner Portal

The most efficient way to open a new Service Request is via our partner portal at portal.teammetallogic.com. Our Partner Portal uses guided questioning to make sure that when the request is submitted to us, we've got as much relevant information as possible to enable us to get to work on your issue straight away. You can also view and update all of your existing Service Requests via the portal as well as access training resources, self-service tools and more. Once you're onboarded with us, you should be able to access the portal directly from within Microsoft Teams - just look for the TML Portal icon on the left navigation bar.



By Sending Us an Email

The fastest way to open a new Service Request is to send an email to support@teammetallogic.com. This creates a Service Request immediately for us to get started on. You'll receive a reply within 5 minutes letting you know we have it and providing you with a Service Request Number so you can easily track progress.

Make sure the subject line is descriptive (e.g., "Setup new user for Frank Smith") and put as many notes as possible in the body of the



By Calling Us

If your request is urgent or you'd simply like to talk to us, you can of course give us a call on 0345 521 0618 and choose option 2 for the Service Desk. We'll grab all the details and enter a Service Request for you.

Bear in mind that while we'd love to be able to give immediate support over the phone it's not always possible, however any urgent or business critical requests should always be notified to us by telephone, allowing us to prioritise your issue and assign an engineer quickly.



QUICK TIP:

If you call our mobile phones or email us directly, it will most likely add an unnecessary delay as we don't monitor these anywhere near as much as we do our main Service Request system.

How Fast Will You Respond?

We are a **Shared Services** business model, which means you're sharing our whole team with the rest of our partners.

Whilst this is good as you don't have to invest huge amounts of money & time to build out and manage your own internal IT team, it means that we might not be able to offer immediate support for you for 100% of the time.










However, we know that one of the easiest ways to make you happy is to provide **FAST** and **RELIABLE** support when you need it most.

So to keep things fair, we categorise all issues into **Priorities** and work them in order. This means that when you have a **Critical** issue – we can work on it really quickly (by taking a little longer to work on your lower priority tasks).

Any issues raised with our Service Desk are prioritised according to the following triage matrix:

	URGENCY	IMPACT
High	Whole company is affected	Major business processes are sopped
Medium	Departments of large group of users affected	Business is degraded, but there is a reasonable workaround
Low	One user or a small group of users is affected	More of an irritation than a stoppage

From this, we'll assign your issue a priority level from P1 to P5:

URGENCY \ IMPACT	High	Medium	Low
High	 P1	 P2	 P3
Medium	 P2	 P3	 P4
Low	 P3	 P4	 P5

The priority level of your issue will determine our target response and resolution times as well as escalation procedures:

Critical – P1	High – P2	Medium – P3	Low – P4
<p>Respond Within: 1 hour Plan Within: 1 hour Resolve Within: 1 Day</p> <p>Criteria Any major failure affecting an entire site / business or more than one device / server</p> <p>Escalation</p> <ul style="list-style-type: none"> • Immediate notification to Engineers • Escalation direct to 3rd line • Escalation direct to Incident Manager • Notification to senior management immediately 	<p>Respond Within: 1 hour Plan Within: 2 hours Resolve Within: 1.5 Days</p> <p>Criteria Incident affecting single, critical device / server</p> <p>Escalation</p> <ul style="list-style-type: none"> • Immediate notification Service Desk Manager • Incident Manager informed • Notification to Incident Manager 	<p>Respond Within: 2 hours Plan Within: 4 hours Resolve Within: 3 Days</p> <p>Criteria Normal service requests and incidents affecting non-critical device / server</p> <p>Escalation</p> <ul style="list-style-type: none"> • Notification to Service Desk Manager if SLA not met 	<p>Respond Within: 2 hours Plan Within: 4 hours Resolve Within: 5 Days</p> <p>Criteria Low priority service requests and incidents with no impact on business operations</p> <p>Escalation</p> <ul style="list-style-type: none"> • Notification to Service Desk Manager if SLA not met
Planned – P5			
<p>Program updates, program installations, cosmetic changes, planned downtime, hardware upgrades, production of documentation...</p>			

But don't worry, we're pretty good at exceeding expectation and our actual response times are industry-leading. In fact, we're so proud of them, we publish on the front page of our web site every month!

How Do I Escalate Something?

Whilst we strive to exceed your expectations all the time, we understand it's not possible to be 100% perfect 100% of the time.

We are humans after all.

So, if you ever have a situation where you feel we're not handling your request as well as we could be, you can escalate that issue...

Here's the order of escalation contacts and their direct contact details:



ESCALATION CONTACTS	
1. Service Manager	Name: Liam Torrance Phone: 029 2085 9044 Email: liam.torrance@teammetalogic.com
2. Partner Success Manager	Name: Louise Cryer Phone: 029 2085 9048 Email: louise.cryer@teammetalogic.com
3. CEO	Name: Mike Parfitt Phone: 029 2085 9041 Email: mike.parfitt@teammetalogic.com

As you'll come to notice, our team is extremely professional, highly efficient and very capable, so hopefully you'll never need to use this process.

However, you now know that if the rare occasion pop-ups where we do miss your expectations, there's an easy way for you to let us know so we can fix it ASAP!

If we ever do make a mistake, you can count on us to 100% own up to it.

\ What Can We Help With?

We're not just here to fix things when they go wrong. We want to develop a trusted, strategic partnership between our business and yours, here to support and advise you with most technology things related to your business.

Here's a list of some of the services we can help with:

- ✓ Office 365 / Microsoft 365
- ✓ Microsoft Azure & Cloud Hosting
- ✓ Hardware & Software Procurement
- ✓ Software Licensing
- ✓ Internet & Private Data Connections
- ✓ VoIP / SIP Trunking & Telephone
- ✓ Hosted Phone Systems
- ✓ Penetration Testing
- ✓ Project Planning & Implementation
- ✓ Procurement
- ✓ Procurement
- ✓ Cybersecurity
- ✓ IT Budgeting (create yours)
- ✓ IT Consulting
- ✓ IT Strategic Planning
- ✓ Disaster Recovery Planning
- ✓ Business Continuity Planning
- ✓ DNS / Domain Name Hosting
- ✓ Domain Name Renewals

Plus, we have a network of Trusted Partners for services like Accounting, Legal Services, Marketing and much more, so if you're looking for something not on this list – get in touch with us via your Account Manager to find out whether we can help you or point you in the right direction!

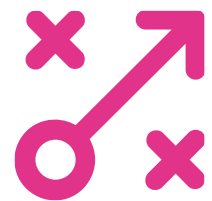
Business Improvement Projects

One of our areas of expertise is working out how businesses like yours can better use **technology** to solve **business problems**.

So, whenever you have a challenge in your business that you're struggling to find an answer for – simply pick up the phone and give your **Client Services Manager** a call.

There's a **VERY** good chance we'll be able to help you find a creative way to solve your challenge, often using a mixture of **business consulting** and **technology**.

We honestly **LOVE** solving challenges like this so we can help you be more profitable, more innovative and more efficient by using technology.



Our Recommended Technology Platform

We'd like to think we can help with everything.

However, the reality is, to be really great at what we do, we have focus on supporting a certain set of products and services.

We call this set of products and services our Recommended Technology Platform (or RTP for short).

We aim for all of our clients to use as much of our **RTP** as possible and we make sure we maintain deep knowledge and training on everything in our **RTP** so we can keep your IT Infrastructure nicely integrated, fast to support and world-class!

Plus, we 'eat our own dog food' by using everything on the **RTP** in our own business!



The Recommended List

- ✓ Microsoft 365
- ✓ Microsoft Azure
- ✓ Microsoft Servers
- ✓ VMware
- ✓ Dell Servers & Storage
- ✓ Dell Desktops & Laptops
- ✓ HP Printers
- ✓ Ubiquiti Wireless Access Points
- ✓ SonicWall Next-Generation Firewalls
- ✓ Sentinel One Security
- ✓ TML Managed Online Backup
- ✓ Microsoft Office 2019 and Above
- ✓ Microsoft Windows 11 Pro
- ✓ TML Horizon Hosted Telephony
- ✓ Polycom IP Phones

Since we can't automatically update this physical manual in your hands, if you want to see the 100% latest up to date version of our **Recommended Technology Platform**, simply head to: <https://www.teammetallogic.com/insight/recommended-technology-platform/>

Third Party Vendors

Whilst we work hard to stay trained and up to date in all of the above Technology, we know that from time to time, you'll need help with something that's not on the list.

When this happens, just bear in mind that it may take us some extra time to familiarise ourselves with supporting that product. But take solace that we are still world-class at troubleshooting other products, so we'll be able to work it out!

Also, please keep in mind that whilst we may be able to purchase items from other vendors that we don't list above, any support may end up being **Out of Scope** for your **Fixed Fee Support Agreement** and incur some extra costs.

We'll always let you know beforehand though.

Your Contacts

Your Partner Success Manager

When your business starts work with us, we assign you a Partner Success Manager

Your Partner Success Manager is on hand to make sure you get the most value out of your partnership with us and is who you should call for any questions about your business and all account level discussions.

Whenever you need to talk to someone about your future plans, your budgeting, upcoming projects or anything else related to your IT Infrastructure, get in touch with your Partner Success Manager.

Your Partner Success Manager will also be the person who will be working with you on your regular Technology Business Reviews (TBRs for short). More about them soon.

You can contact your Partner Success Manager quickly and easily by simply e-mailing partnersuccess@teammetalogic.com or calling us on 0345 521 0618.



There's no need to get in touch with your Partner Success Manager for helpdesk support or Service Requests as they'll simply tell you to get in touch with the Service Desk team directly for the fastest help and quickest response!

Your Primary IT Contact/s

As part of your Onboarding, we asked you to appoint a **Primary IT Contact** from your side (or sometimes a few).

Your **Primary IT Contact/s** are the ones authorised to make changes to your account and are who we send important information to.

If you're not the Primary IT Contact in your business, then it's best to speak to them whenever you have a request that includes adding / editing or deleting users or data as they'll need to authorise it first.

We have this security in place for your protection as we wouldn't want to give a new user access to your confidential data one day that they didn't have authority to access.

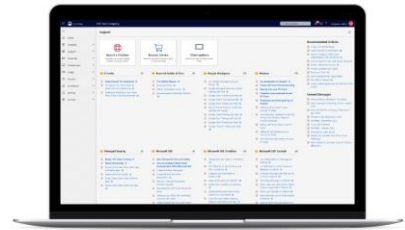
Your Accounts Contacts

If you ever need any help with any billing issues (such as needing copies of invoices etc), simply shoot an email to clientbilling@teammetalogic.com and our friendly accounts team will help you out. You can also call them on 0345 521 0618 – they're available business hours, Mon – Fri.

\ The TML Partner Portal

Customer experience is fast becoming one of the main differentiators in the Managed Service Provider / IT Services world. Creating an amazing experience for our Partners is key to us achieving World-class partner happiness levels and consistently positive feedback. One of the ways we provide this amazing experience is through our Partner Portal.

The TML Partner Portal helps empower those partnering with us by providing an array of self-service features – like logging tickets, adding new employees, ordering new services, strategic roadmap planning, and even training – all in an intuitive portal that we know you’ll love.



We make accessing our portal as easy it can be – there’s no separate username or password to get access, users simply login with their existing M365 or Google Workspace credentials.

And if they forget these credentials, one-click is all it takes to get a password-less login link delivered straight into their inbox.

But we want our portal to be even easier than that – visible where you work most frequently so training, quick-start guides and a route to fast support are only a click away. That’s why we integrate our portal directly into MS Teams for our partners. Alongside buttons for ‘chats’, ‘teams’ and ‘calls’, you’ll find our portal. And because you’re already signed into Teams, you’re straight in without needing to login, remember a password, or even a web address!



NEED TO ACCESS THE PORTAL?

Simply head to <https://portal.teammetallogic.com> and choose to login with your M365 or Google Workspace credentials. Or for easier access, click the ‘TML Portal’ icon in the navigation bar in Microsoft Teams

For more information on our Partner Portal, including a video walkthrough, simply head to our website at <https://www.teammetallogic.com/our-approach/partner-portal/> or alternatively just reach out to your Partner Success Manager for a one-to-one demo.

\ How Do I Order Hardware or Software?

Whenever you need any new equipment or software, we've got you covered.

We have a dedicated procurement and ordering system designed to take the hassle and pain out of the process whenever you need to order anything.

Smaller Orders

If it's for a small order such as a few new computers or laptops – simply give us a call on 0345 521 0618 or shoot us an email to sales@teammetalogic.com and we'll send you back a quote. We aim to get all quotes back to you within 4 business hours. You'll also find Self-Service options for ordering common items like laptops and accessories in our Partner Portal at <https://portal.teammetalogic.com/app/service/request>

Larger Orders

If your order is large or it's for a project (like a migration an office move), then it's best to speak to your **Partner Success Manager** so they can make sure that they align everything up properly for you.

They'll work to get you an official Fixed Fee Proposal to cover everything you need!

Approving And Paying

Unless it's a complex project, we'll typically send you your quotes & proposals using our web-based quote delivery system.

You'll simply need to click on the link in the email and you'll be able to view the quote or proposal. You can simply click on the Approve button to submit the order.

We have a system in the back-end that alerts us as soon as an order comes through and we jump on to getting the goods ordered ready for you ASAP!

What About Out Of Stock Items?

If something is in stock, we'll normally be able to get it delivered to you within 1-2 business days.

If it is out of stock, our **Procurement Team** will keep you up to date with estimates on when it's due to arrive.

If our distributors tell us that it's going to be out of stock for a while, we'll work with you to find some alternatives (especially if it's something you need quickly).

Credit Accounts

Any purchases you make will be charged to your credit account with us up to the value of your credit limit. In order to maintain your credit limit we ask that you settle all invoices by Direct Debit within 30 days.

Some More Important Bits

Here's a few more important bits of information to help you better understand and navigate the crazy technology world and some of the terminology we may use when we're talking to you!

Security vs Usability

In the technology world, there's an ongoing battle between **Security** vs **Usability**.

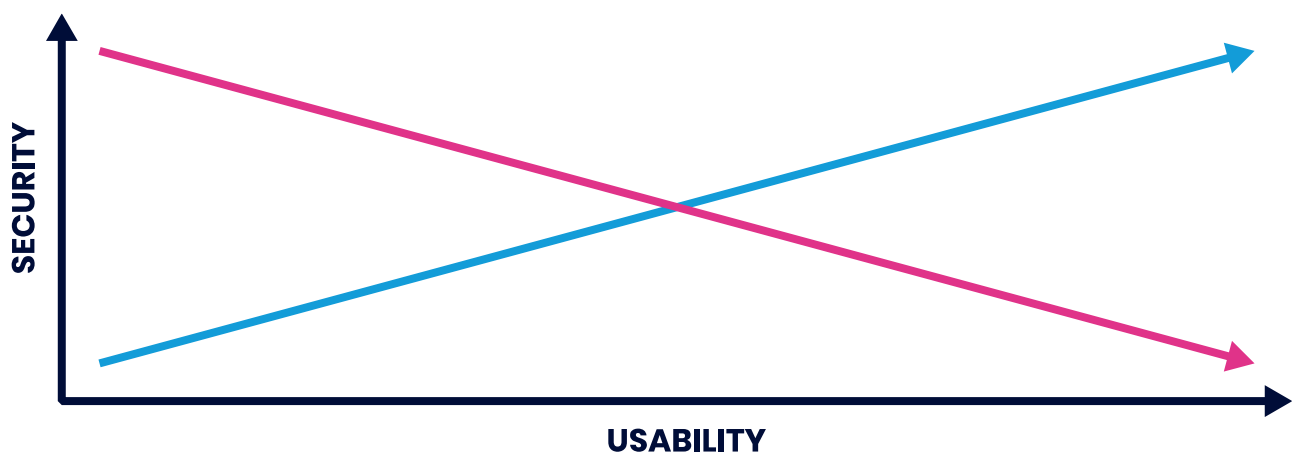
Every day, there are millions of hackers around the world, trying to break into networks like yours. There are literally high-rise buildings full of these hackers in countries like Russia and China, and even closer to home across Europe.

And, the best way to defend against them is to **NOT** use technology at all.

But that wouldn't be fun, right?

The problem with technology though is that typically, the more **secure** your systems, the harder they become to use!

On a graph, it looks a little like this:



So, please know that we do our very best to make your business as secure as we can with the budgets you give us to work with. And, at the same time we also try to make things as easy to use as possible, while keeping security as high as we can.

You might notice this in things like our strong recommendation that every single user uses **Multi-Factor Authentication** (also known as MFA or 2FA).

We know it can be painful to use because we protect 100% of our systems with it.

However, turning it on, can help block LOTS of the most common hacking attempts that are happening on your network to help keep your data safe.

We err on the side of high security, but we also aim to for easy usability.

\ In Scope vs Out-of-Scope

If you've ever been to an All-You-Can-Eat Buffet, you'll know that you're able to eat as much of anything that's out on the buffet as possible.

However, if you'd like something that's NOT on the menu – then you have to **pay for it separately**.

Our Fixed Fee IT Agreements and Fixed Fee Projects work in the exact same way.

That means, that you can have as MUCH as you like of anything that we cover in our **Inclusion List** for your Agreement or in the **Scope of Works** of a Project.

(just like you can eat as much Sweet 'n' Sour pork on the buffet)

And, when you need something that's not on the list, we will simply quote you a separate **Fixed Fee Quote** so you can work out whether you want to go ahead with it or not.

We call this whole conversation **IN-SCOPE** and **OUT-OF-SCOPE**.

And, whilst we have worked hard to build an offering where pretty much everything you will need in the day-to-day operation of your business will be included **IN-SCOPE** – you might find from time to time that there will be things that are **OUT-OF-SCOPE**.



If you're unsure if something's included or excluded, either check your **Inclusion List** on your **Agreement** or simply give us a call!