RT: For those who don't know what a Chief Product Officer is, what's your role within ConnectWise?

CF: It's best to explain it in terms of how we align the company. ConnectWise used to be multiple companies – LabTech, Quosal, ConnectWise Stream - we all became one company last year and starting aligning the products as business units.

We master branded the products just to ConnectWise, so we then needed to unify our products and the roadmap, and the Chief Product Officer role was born from that need. I lead all of the product business tasks – sell, automate, control – and then there's another unit that manages Cloud Console, Chat Assist, Campaign Director.

I work with all the general managers to align the roadmap, to align product marketing and my goal is to keep all the products going in one direction and set that vision. Now that we're one, we want to become one solution, rather than a problem you manage.

We look across the entire suite of products to say, 'IT companies have these problems, so let's not limit ourselves to one product, but look at the suite holistically', and then I coordinate that with the managers.

RT: When I first knew you, your role was radically different to what it is now! Perhaps you can share a bit of your background and where you've come from to get to this role?

CF: It's quite a journey! It's like one of those stories you hear about someone climbing up the ladder. I was a technician for the longest time, and started doing that in 1995. I was certified to work out in the field, and I started out working for ConnectWise IT company.

After a couple of years, I decided I wanted to switch over to product development and the PSA (professional services automation) solution, so I did, which is when we met for the first time. I came to the user groups as a consultant of the software - an education consultant.

About four years ago, I focused hard on product management, and I wanted to understand how we could build the products that people wanted to use and would enjoy. When I started looking into that I realised that I loved spending time with partners and understood their pains, so I wanted to build that into product development, and I love coming to these events and hear how people use the solutions.

RT: Let's rewind a little bit. We talked about the unified interface, and the unification of the ConnectWise products, so to someone old-school like me, we've got Quosal, ConnectWise PSA, LabTech… what are the products called now, and how do they all fit together?

CF: Now, the products are called Sell, Manage, Automate and Control. Sell is formerly Quosal, Manage is what we used to know as ConnectWise, Automate used to be LabTech and Control was ScreenConnect.

The reason we rebranded them was because it's easier to tell our story. We can say: "At ConnectWise we're a community-driven software company and our platform helps you sell more, manage your customers, automate your service delivery and control technology."

It's easier to talk about, because you don't get hung up on trying to remember the product name, and that really helps break down the barrier around separate products that are integrated. We don't think in those terms any more, we just think of it as software.

You don't say 'Oh, Excel is integrated into PowerPoint', you just know that they work and you can copy and paste from one to another. That's the way we look at ConnectWise now, and changing the names helped with the mindset of being one company, and it's seamless integration.

We know that everyone does their jobs on the tickets, and we want them to do it there (within the ConnectWise platform) – we don't want them leaving, so we put the computer management screen of Automate there, and we'll put in the remote control button, the Cloud Console and Office 365 information too.

We know that user experience is key, and as us coming together and unifying, that's a big focus for us. We don't want the experience to be clumsy or awkward, we just want it to be a series of smooth clicks. That's what all the name changes and aligning of roadmaps is about.

RT: It's going to take some time for old-school people to get used to it, but I totally see the logic behind it.

CF: I know! People comment that we've changed the screen or moved something, and I'll admit there are times when I don't watch the product development closely, and then the teams will bring me changes I wasn't expecting. I always say, if I can figure it out, then anyone can. Things are just where you think they'd be, it's just intuitive.

RT: In your keynote (prior to this interview being conducted), you referred to a 'user-centric services'. What is that?

CF: It's about providing support to the user. When I was a technician, we just provided support to the device and focused on fixing it. When we sold to a customer, we talked about how much RAM (Random Access Memory) and gigabytes they were getting.

I started to see our community saying, 'customers are getting a lot of devices now and they're changing rapidly, so it's harder for me to keep up with supporting and billing by device. I'm going to switch my mindset to supporting a *user* instead.'

The user-centric tool is about understanding who the user is, looking at the directory and pulling them into ConnectWise so you can do that. You might have been talking to them on a helpdesk for years before you ask for the name, and they realise you don't know who they are, which doesn't give a good impression.

It's about knowing who the user is and billing them. This is a big shift and it's been interesting to watch. I first saw someone do this seven years ago, and he explained that when he sent his invoice with all the devices listed the customer would pick it apart.

Instead, he decided to charge by user, and list them on the invoice with a price, and include the server workstation price into that. If he was charging $400 per server and $100 per workstation, he would charge $200 per user. When clients got the new invoices, they have a list of users who they're paying support for, and the servers and workstations are still included but no longer have a price associated.

This is a big shift we've seen, and when we look at statistics, over 65% of the ConnectWise community is doing some kind of hybrid of billing by user and by device. With user-centric we wanted to provide a tool to solve that problem of who the users are and how to bill for them. They find them on Active Directory and include them on the invoice.

RT: Is that a two-way sync, or is it pulling the information through?

CF: It's a read-only, pull from Active Directory, because we don't want to write anything back in there. The technician will still do their job of adding and terminating users, because there are a lot of security settings and group policies, which needs to stay in the Directory.

What's nice is that once you get the user set up into ConnectWise they go onto the bill, and once they leave they come off the invoice and they're set to inactive. It's good to set it and forget it and the invoice can do what it needs to do.

RT: You mentioned the statistic of 65% of the community using a hybrid for billing. What's the percentage of MSPs (Managed Service Providers) across the board who are purely doing user pricing?

CF: MSPMentor had an article on this back in 2014, and they had a figure of 20%, so I would guess it's still about that. Probably about 23% of MSPs are billing only by user and not factoring anything else in.

That's a bold step, because depending on the services you're providing you could be giving backup, network services, workstation support and so on, and rolling that up into one price can be daunting. I think that's why you see more of the hybrid, because people want to check if it's going to work and what'll happen if they need to change prices. As more cloud movement happens and people have more throwaway devices such as tablets, we're going to see the user-only model getting stronger.

RT: On the topic of the changing landscape of IT – almost all MSPs have some form of cloud service now. Talk to me about how ConnectWise and the Cloud Console makes it easier for them to manage those contracts?

CF: The cloud is something that's been very personal for me as a former technician, and we started to see people moving to it about ten years ago, putting things into the cloud and moving them back again.

We made a prediction about five years ago that it would probably happen one app at a time. The companies making software and apps are going to put it in their own cloud, and we're seeing it happen now.

I saw a keynote at a Microsoft partner conference a couple of years ago and they talked about cloud service providers, which was clearly a problem for our partner community. In this two-tier model, you have to buy Office 365, add your services through distribution and then bill for it.

Users come and go and licences change quickly, which causes management and billing issues, and we know that MSPs like to be proactive and monitor things. We released Cloud Console last year and started with Office 365, provided a means of managing all of your customer's 365 in one place, including monitoring, in the same way that MSPs are with on-premises systems.

At the end of the day, the customer just wants to know that their IT service provider is on top of things. There's nothing worse than moving Office 365 and problems arise so the customer has to call the MSP – it should be the other way round. Cloud Console monitors the customer's services, so when there's an issue it alerts the MSP, lets them create a ticket and it tells the customer.

We knew that billing software meant there would be pro-rating issues, users would come and go and nobody wants to sit and count all of that and track how long they were there, so we've automated all of that for the MSPs. They can manage their clients' 365 on the company record, monitor and create tickets and deal with the billing. The agreements for the managed service contracts are the same.

We've also recently added Azure, so you can now manage the virtual machines, the SQL (Structured Query Language) databases, websites and storage from within ConnectWise. We're now looking at what Amazon is doing too, and some partners have told us about what they're managing in the cloud, which we may add to the tool as well.

We have over 700 partners using Cloud Console, which we're happy about. Microsoft has been happy with us and we've teamed up with them to bring discounts to our partners and deliver marketing materials. We did this because we saw that Office 365 was going to be a challenge for our partners, and we wanted them to have a tool to be successful.

RT: It sounds like you've done a great job. I was blown away by what you've done with the Azure management directly in the console, because it means users aren't jumping from panel to panel, they can do it there.

CF: You can have a ticket that tells you the machine is running slow, so you can go in and increase the CPU, and we even have financial notifications in there. Any time someone's making changes, you'll get billed, so the customer needs to be billed as well, which is why we're on top of all of that stuff.

RT: What might be next for Cloud Console? Something like Google Apps?

CF: We're looking at Amazon, because they recently announced their cloud infrastructure, where you can spin it up very easily. It's geared towards service providers, and we've seen some momentum there, particularly in the United States, so we're working on that.

There are also some cloud-based Cisco tools that we've seen that we'd also like to use, so that's another focus. It's mostly driven by demand from our partner community – whatever they need is what we go after.

RT: We touched on how complex billing can be. ConnectWise as a company seems to be a big advocate of sending out a single bill or invoice for clients. Can you tell me a bit more about that philosophy and why it's important for MSPs to do that?

CF: We talk about the customer journey, and billing is a big part of that. When you look at a journey, you have to think about what the customer goes through with an IT service provider. First of all, they have to become aware of what that provider has to offer, such as Office 365, backup and managed services.

Then, they have to evaluate the offerings through a quote of some kind, they purchase them and the stuff gets delivered, with follow-up support. I find that a lot of the partners are good at those steps, and then they let things fall apart with the billing by just throwing an invoice together without thinking about it.

Your quote and your invoice need to look the same, because if someone's agreeing to buy something from you, the whole customer journey leading to the invoice should be awesome. If you drop the ball on the bill, they're going to forget everything that went before.

If I went out as a technician to do some work for a client they're happy, but if they get the bill and it doesn't match their expectations they won't be so pleased the next time I visit. It's important to get one, accurate bill to the customer, and every part of the journey has to be exceptional.

I've seen partners send separate bills to clients – one for Office 365, one bill for the other software they buy and one for managed services, which can't be enjoyable for the customer. It also means they have questions and you're wasting time dealing with those.

It makes sense to have everything on one bill. Look at the world we live in – when I'm looking for a cable provider, I ask about other services too so it as much as possible can be on one bill. I fear sometimes for these IT companies who aren't sending one bill, because you're allowing a competitor to come in.
For example, if you charge separately for Office 365, another seller could offer it to your client too. The individual bills make them feel like they're working with two different people, so if another IT company approaches them with a cheaper 365, the client will move.

It's a better experience for the customer if they get one bill, and it makes it harder for a competitor to take over. It also makes it hard for the customer to question things when they're all lined up. I feel that it should all be automated, because nobody wants to add it all up at the end of the month.

There are so many chances for getting it wrong, so they need to take advantage of the automation we have in our suite which counts it all for you and sends one invoice out to the customer.

RT: If we take a step back and look at the user versus device pricing, what I'm seeing is when MSPs send out that user invoice, they still list the devices but with zero price.

CF: Yeah, I've seen that a lot. You have to put yourself in the customer's shoes – if you send the invoice out and it has less information, they're going to start questioning things. Or you may send the invoice to the same person every month at the company who just pays it, but one day someone else might get it, and if there's not enough detail on the invoice they'll question it.

There's a mentality of – for every $1,000 you bill, you need an inch of text on the invoice to explain what it's for and the customer feels like they're getting something for the money. It sounds crazy, but it works. That way, there are never any questions, no matter who gets the invoice.

RT: I think that's sound advice. When I ran an MSP company, we sent out a multi-page invoice with a single line item and a list of everything we offered. When customers came and asked about reducing the bill, they couldn't actually identify anything they wanted to move.

Before you bill the customer, you have to woo them and bring them on board, and that includes marketing. You've made great strides with the marketing facilities built into ConnectWise. Talk to me about Campaign Director and what's happening there.

CF: This was something near and dear to me, because I was closely involved in developing it. Arnie and I worked with one of our partners, Tim Brewer, to document what we called the 'path to success' – what an IT company goes through.

We found a lot of gaps in marketing, because many of them were doing referral marketing, so we started working with MSPs to mature their practice and demonstrate the most efficient way to do this. They were looking at increasing automation to make staff less busy, and making that the ultimate goal.

If you have 25 staff and all your resources and helpdesk staff are busy all the time, the idea is that you should be able to bring Automate in and make them less busy. Your staff don't have as much to do, so you need to bring in more business to occupy them. What happened then was that partners admitted that they weren't very good at marketing.

We identified a big gap and looked for ways to help the companies mature in their marketing. Most of the people in the IT community are really good technical people who accidentally became company owners. We wanted to help them get better at marketing, so we brought in Campaign Director, soon to be renamed ConnectWise Campaigns.

The tool works like connecting your business to the internet, because the way we see it is when people look for ConnectWise, they want our website not our postal address. We have another partner, Rajah, who owns Final Step, and nobody knows where he is, but they know his website.

We decided we needed to connect everyone to their websites, so we'd link them to ConnectWise. Campaign Manager allows you to build interactive landing pages with forms. You put the landing page on your website, and when a customer is driven there from SEO or a paid ad, they fill the form out and it creates an activity in ConnectWise for the sales rep to call them.

There's research that shows you've got 15 minutes to complete a call to action. When a customer says they're interested, you need to call them in 15 minutes or forget it. Campaign Director also does email campaigns and lead scoring on those.

All the points accumulated when someone reads and takes action on an email are sent to the sales team. Marketing is like putting a package together, putting a ribbon on it and handing it to sales ready to use.

We've also recently enhanced it so that it now integrates with social media, so it works with Facebook, LinkedIn and Twitter. As you interact with your own customer community, you can schedule posts to encourage people to make a purchase or get in touch.

We monitor all of the activity and the effectiveness of the campaigns and tie it into the sales module and the quotes themselves, so you can see if a campaign actually worked. You can't just assume that something is a good idea and run with it – you have to watch the metrics, so we give you that feedback. It's perfect for our partners to start getting into marketing.

RT: I think marketing is the weakest part for most MSPs, and they rely too heavily on referrals, although I do understand why that happens. Let's dig a bit deeper into Campaign Manager – where do you see this part of the product going? Do you see it growing to be something to be a competitor to HubSpot, which MSPs talk about?

CF: I'm really not sure yet. We've got over 600 partners using Campaign Manager now, and we'd like to see more using its capabilities. We will most certainly add to it, but right now we're focusing on the social media component of it. I think where we're better than things like HubSpot is because we tie it into where you do your business, which is by integration with ConnectWise.
We're also better because we allow you to manage as many contacts as you want, which is like having a separate database. You can keep contacts in Campaign Manager who you market to and it's separate to your contacts in ConnectWise Manage, because the data needs to be clean. We won't move them across until it's the right time to do so.

A lot of the competitive products don't do those things, although I do understand that they have more advanced features, such as A/B testing, which people are asking for. We're looking into that, and we now have a dedicated product manager working to advance it.

We're thinking about what's next and what our partners need, and we don't like to just run off and develop things on our own gut feeling, so we're going to start holding focus groups with partners to figure out our next steps. Last year people asked for social media integration, which is why we've rolled that out.

RT: It looks like a cool tool. I mention HubSpot because within my own business, which isn't an MSP business but markets to them, I use things like Buffer and SmarterQueue to do scheduling, and you've got things like that built in.

So while a social media geek like me might thrive on third party tools, for an MSP who's getting into social media for the first time, you're making things simple for them. I look forward to seeing the product develop.

Let's talk about service delivery and the technicians managing users and devices. I want to talk about ConnectWise Control, and the remote control facilities that you've got built into the product now. Can you elaborate on what that looks like and how it works in the real world?

CF: We wanted to put remote control at the fingertips of the technician, and this is the part that I love the most, because it's my background. We're really focused on the user experience, because that's what the world is about.

When you're in ConnectWise or any screen, we're looking at where a remote control button should be. If you're creating a ticket, it needs to be there, even if you don't have an RMM (remote monitoring and management) or automation agent. We've put Control in the places that make sense in Automate and Manage so it's one click and you're connected.

This works for Mac, Linux, Word or anything else, as we support all of them. It's important to support our partners with this, because you need to use a tool that's auditing as well. When you launch the remote control in a ticket, we record the details within it – the time, who it was for and why.

I've seen IT companies and MSPs get into trouble for not recording things. In the United States we have a hyper rule about medical information – you can only view certain screens, particularly if it has patient details on it.

We're proud that we're looking at things like that, because it needs to be recorded. We're helping to protect our partners when they're using it, and bringing it to where they want it. Even on a mobile device they can get alerts and updates while they're out and about and fix any problems that customers have.

We think this stuff through in detail at ConnectWise, because we know where and how MSPs do their job and how they want to do it. We've built it that way specifically, and what we've done with Control is put it where it makes sense.

We're excited to be putting out some new developments soon, one of which is the ability to be able to see through your customer's phone camera. This helps the MSP or technician to see what they client is looking at and then talk them through how to solve a problem.

We've just launched a free version of Control, with a limited feature set, and we're happy for people to stick with it rather than upgrading to the paid version. I'd encourage anyone who has ConnectWise but isn't using Control to try it out and use the remote control button.

RT: When I look back on it, I wonder how we ever did business without these features!

CF: There's nothing worse than being a technician and getting an alert at 2am. Every second matters, so you're anxious. It's awful opening up your remote tool, navigating to find the device and wonder if it's going to open. It's nice to have a ticket showing the issue so you can quickly get into it and control it.

Not only does the anxiety go away, but you can have confidence that you're using a tool that's going to support what you want, which is really nice. I'm very excited about it.

RT: Going off on another tangent – what was your first computer?

CF: It was a Commodore 64. No, I take that back – it was a VIC-20 that you put the cassette tape into. The first computer I ever used was an Apple IIe in the school library, and then I got my own. I went from the Vic to the 64 and then a Tandy 500.

RT: My first computer was an Atari 600XL, with 16K of memory!

What's next with the ConnectWise product? What could you bring to its users' attention that they might have overlooked?

CF: We'll start with ConnectWise Sell, our electronic ordering module. Whenever you look at an IT company and all the issues they have with procurement, you realise it's a very manual process. We wanted to automate that so people can do electronic orders that gather the tracking information and the vendor's PO and puts it all in one place. We're excited to announce that we have that.

Other new things are features in ConnectWise Manage, such as the ability to copy tickets so you only need to amend a couple of fields, rather than filling it out again. It also works for configuration and workflow roles, and you can merge tickets too, which is particularly good when you've got several users at the same site with the same issue.
ConnectWise Automate has a lot of new updates, such as patch management, and I get so excited about that as a former technician! It means that you can take all of the third-party vendor software and load it into one patch manager and keep it all updated.

We're also automating the centralised management, so users can see all of their clients in one simple view. In Control, we're introducing mobile capabilities so you can use it on your device and see through the customer's camera.

We've added workstation information, so if you're remote controlling into a customer and they join you, you get a quick preview of all the issues before that happens – what their hard drive and memory looks like – so you can start to prepare yourself before you connect. This means you don't have to click all over to find the information you need.

Cloud Console now has Azure, Campaign Director has the new social media component, and there are so many other new features and updates that I'd encourage anyone to go and look at our roadmap on the website to see what they all are.

RT: What's next in terms of big ticket items?

CF: Going back to our unified roadmap, we really have a vision of it being one platform, one solution, so we decided it would be good to be able to sign in once too. We're working on single sign-on, so people can log into one app and get in to all of them.

There will also be a single manager interface, so there's one place to go to manage all the users across all products, and one unified customer portal to expose invoices, have remote and create tickets.

There will also be SAML (Security Assertion Markup Language) integration – that's the authentication method that helps centralise products. It allows users to turn Google or Active Directory into a SAML provider to integrate any ConnectWise product.

We're also working on localisation. As we speak, the developers on the Manage team are coding all the changes that occur from country to country – for example, when people use a dot (.) or a comma in figures. You can make any date format you want, too, so it reflects what you use in everyday life.

We're also setting the ground for multiple languages, so we hope that next year we'll have different language packs. Those are our localisation things happening in Manage.

RT: I mentioned to MSPs that I was going to be interviewing you and asked them what they'd change or alter in the product. One of the most interesting feature requests was about Chat, which is still fairly new within ConnectWise.

They'd like to see Workflow included, so while you're chatting with a customer, certain words are mentioned and it allows you to choose rapid responses, which sounds cool.

CF: That's actually something we're piloting in our own support team right now. That's the exciting thing about the cloud – people get nervous about it but it means we can do things we've never been able to do before.

I can build artificial intelligence machine learning around chat. It can now analyse all the other chat conversations, certify commonalities and when it sees a chat come in start making those suggestions to the technician.

We've been playing around with the technology and we're rolling it out with our support desk to see how it goes. Hopefully one day we can productise it and include it in Chat, so it's interesting that someone brought it up.