

# Finding an RMM for XBirt

Closeout Report  
December 9, 2020



## **Team Members**

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# 1. Project Overview

The project overview reviews our sponsor and discusses the scope of the project. The company profile on Xbirt is included along with their business needs that needed to be addressed in the final project solution. Information like group structure and roles are included along with a running project schedule.

## Company Profile:

XBirt IT Services, founded over ten years ago by Nick Deary, is a managed service provider (MSP) designed to handle, manage, and protect company computers. As a MSP, XBirt provides essential IT services like hosting software products for customers to providing IT functions like virus protection on client computers. XBirt also provides IT business functions like project management, vendor selection, RFP generation and more.

XBirt IT Services currently uses two primary RMM's: LogMeIn Central, and Datto RMM. Although they have been getting the job done, there are several pain points that need to be evaluated and fixed. The main issues have to do with the capabilities of their data managing software, and the reliability of the customer service of the RMM's. We will be looking into different RMM solutions for XBirt so they can provide better customer support to their customers and get better value from their software.

## XBirt Project Business Need

### **1. Context**

XBirt supports customers as a managed service provider (MSP). As a MSP, XBirt provides essential IT services like hosting software products for customers to providing IT functions like virus protection on client computers. XBirt also provides IT business functions like project management, vendor selection, and more. Their current tools for performing these functions are hindering performance and causing issues when support is needed. XBirt wishes to look for new tools that provide better support and that provide more features.

### **2. Business Need**

- The new remote software needs the ability to provide customers with robust technical support service remotely while being easy to use for XBirt
- The new remote monitoring and management tool needs to provide essential management features for all of the client's systems without being intrusive to the user

- Both new solutions need to be secure enough to handle confidential data transmission to ensure compliance
- Ideally, both solutions need to have a quality North American customer support center to ensure there is no language or time barrier to accessing support

### 3. Supporting Facts

Nick at XBirt will assess solutions that the group recommends for performance, ease of use, and quality of support.

### 4. Assumptions

- The new tools need to be as robust as the ones they are replacing
- Technical support for these tools needs to be higher quality compared to the current solutions
- After adopting these solutions, XBirt will have an easier time executing the essential functions of the business

### 5. Approvals

**Nick Deary:** XBirt Founder

**Myles Cheda:** Team Leader

**Cindy Stevens:** Wentworth Professor

### Group 1 Contract

Member Name	Individual Strengths	Kolb Learning Style Preferences: <a href="http://wit.edu/lit/engage/experiential-learning-kolb.html">http://wit.edu/lit/engage/experiential-learning-kolb.html</a>	deBono Six Thinking Hats Preferences
Myles	Communication	Reflection	Blue
Spencer	Analysis	Thinking	White
James	Organization	Experience	Yellow

**Roles: Assigned role(s) on the team – see Typical Group Roles document (Allen, Duch & Groh 2001)**

- Discussion Leader – Myles
- Recorder/Record Keeper – Spencer
- Reporter – Spencer
- Accuracy Coach – Myles
- Skeptic – James
- Timekeeper – James
- Reflector/Summarizer – Myles

**Assign Tasks: Identify who is doing which parts of the group assignment**

- Analysis of options: Spencer
- Group Leader: Myles
- Synthesizing information: James

**Negotiate Working Agreements – these will evolve over time:**

- Weekly meetings on Tuesdays
- Sponsor meetings biweekly or as needed
- Weekly work will be delegated among group members and completed as assigned
- 

**Agree on Technology Tools the Group Will Use:**

- The team is using Google Drive to create and share project materials.

- Zoom is being used to conduct meetings as a group and with our sponsor.
- Phone or email are generally used to contact one another

### Project Charter

#### 9. **General Information** – Basic information that identifies the project.

Project Title – XBirt Computer Management Consulting Project

Proponent Agency – Tech Acquisition MGMT-3060-02 Group 1

Prepared by – The person(s) preparing this document.

Myles Cheda, Spencer Nuzzo, James Weidner

Points of Contact – List those individuals who may be contacted for information regarding the project. Provide the title, name, organization, phone number, and email address of the following individuals:

Project Sponsor - Nick Deary

Organization: XBirt IT Services

Email: nick@xbirt.com

Project Manager - Myles Cheda

Email: chedam@wit.edu

Project Team: Myles Cheda, Spencer Nuzzo, James Weidner

## 2. **Executive Summary -**

XBirt IT Services, founded over ten years ago by Nick Deary, is a managed service provider (MSP) designed to handle, manage, and protect company computers. As a MSP, XBirt provides essential IT services like hosting software products for customers to providing IT functions like virus protection on client computers. XBirt also provides IT business functions like project management, vendor selection, RFP generation and more.

## 3. **Project Purpose -**

XBirt IT Services currently uses two primary RMM's: LogMeIn Central, and Datto RMM. Although they have been getting the job done, there are several pain points that need to be evaluated and fixed. The main issues have to do with the capabilities of their data managing software, and the reliability of the customer service of the RMM's. We will be looking into different RMM solutions for XBirt so they can provide better customer support to their customers and get better value from their software.

## 4. **Assumptions -**

- The new tools need to be as robust as the ones they are replacing
- Technical support for these tools needs to be higher quality compared to the current solutions
- After adopting these solutions, XBirt will have an easier time executing the essential functions of the business

## 5. **Project Description, Scope, and Management Milestones**

### ***1. Project Description -***



Our team will look for a replacement RMM tool that fits the needs of XBirt better than their current software. Nick Deary will be our primary contact for XBirt, and we will work with him to model our results. The tools we find should have better customer service and should be easier to use while still being comprehensive.

**2. Scope** - The Project Charter documents the project scope. Project Scope defines all of the products and services delivered by a project, and identifies the limits of the project. In other words, the scope establishes the boundaries of a project. The Project Scope addresses the who, what, where, when, and why of a project. Describe the sum of the products and services provided and identify the limits of the project.

At the conclusion of the project, we will present Nick with our findings on alternative softwares. This will include a presentation including multiple comparison charts of various RMM tools. We will also try to gauge customer support of the tools we have selected to present as alternatives. For deliverables, we plan on delivering a comparison report and presentation about our findings.

**3. Summary of Major Management Milestones and Deliverables** - Provide a list of project management milestones and deliverables (see Project Proposal, Section E). This list of deliverables is not the same as the products and services provided, but is specific to management of the project. An example of a project management milestone is the Project Plan Completed.

6. **Project Authority** - Describe the authority of the individual or organization initiating the project, management constraints, management oversight of the project, and the authority granted to the Project Manager.

**1. Authorization** – Nick Deary

**2. Project Manager** – Myles Cheda

**3. Oversight** - Cindy Stevens

7. **Project Organization** – This section provides a graphic and text description of the project team and other stakeholders. Provide an organizational diagram, a brief description of the type of project organization that is being implemented, and a description of the roles and responsibilities of all stakeholders. Some stakeholders may exist who do not have a formal organizational relationship with the project team but who have roles and responsibilities related to the project. The roles and responsibilities of these stakeholders should also be addressed in the roles and responsibilities paragraph.

1. **Organization Description -**

Myles is the leader of the technology acquisition project team. Spencer and James are team members with unique roles like meeting minutes writer, lead research, etc. Myles maintains communication lines with Nick at XBirt, and the group works on the content of the project together.

2. **Roles and Responsibilities –**

We as the project team/consultants are expected to produce research/deliverables for XBirt that help explore alternatives to their current software issues. Dr. Stevens monitors our performance and guides us on what we should be completing. Nick at XBirt is our sponsor who describes the problem he wants solved and works with us to help alleviate that problem.

8. **Resources** – Resources used during this project were the project sponsor, the project teammates, and online resources. Most information for this project required research online from various members of the IT community sharing their experiences with different RMM tool providers.
  
9. **Signatures** – Myles Cheda, Spencer Nuzzo, James Weidner, Dr. Stevens, Nick Deary

Project Dates

Objective	Description	Date started	Dated completed
Determine universal meeting date and time	Discussed a common date and time to meet that works for all groupmates	9/20	9/20
Meet with sponsor	Meet with sponsor to discuss company issue and decide on a meeting schedule	9/20	9/25
Complete group contract	Work with groupmates to complete group contract	9/30	9/30
Complete business need	Work with groupmates to complete business need	10/7	10/7
Complete company profile	Work with groupmates to complete business need	10/7	10/7
Meet with sponsor	Meet with sponsor as scheduled in the bi-weekly meeting schedule and discuss progress of objective	10/9	10/9
Complete project Charter	Work with groupmates to complete project charter	10/22	10/22
Meet with sponsor	Meet with sponsor to discuss progress of objective	10/23	10/23
Met with group	Met with groupmates to discuss what work needed to be completed	11/17	11/17
Worked on Final Project Slides	Worked on powerpoint presentation for final project	11/28	11/29
Presented Final Slides	Presented final project powerpoint to class	12/2	12/2
Met with Sponsor to go over slides	Met with sponsor to discuss and present final project powerpoint	12/2	12/2

## 2. Project Performance and Outcome

Project performance and outcome contains information about what work we did and how we weighed our options. Most of these come in the form of matrices and other graphs used to rank our different options for RMM tools. Other project functional documents like the issues matrix are also included in this section.

### Communications Matrix

Communication	Purpose	Medium	Frequency	Audience
Kickoff Meeting	Meet sponsor, discuss project objective	Zoom	Once	Sponsor
Project Team Meetings	Completing objectives	Zoom	Bi-Weekly	Team members
Bi-Weekly Sponsor Meetings	Updates on project team work, ask questions about content	Zoom	Bi-Weekly	Sponsor
Project Status Reports	Update on status of tasks	Zoom	Monthly	Sponsor, project team
Informal Texts	Scheduling quick questions and concerns	SMS	Weekly	Team members

### Risk Matrix

Categories		Serious illness of a stakeholder, companies unwilling to provide any information	Disorganization causing issues with scheduling and performance	Groupmate is underprepared or can't make a meeting	Meeting needs to be rescheduled, minor day-to-day issues
		Catastrophic	Major	Medium	Low
Absolute, a given.	Certain	Very High	Very High	High	Medium

High probability of happening	High	Very High	High	Medium	Low
Infrequent, but possible	Medium	High	Medium	Low	Low
Rare	Low	Medium	Low	Low	Low

### Issues Matrix

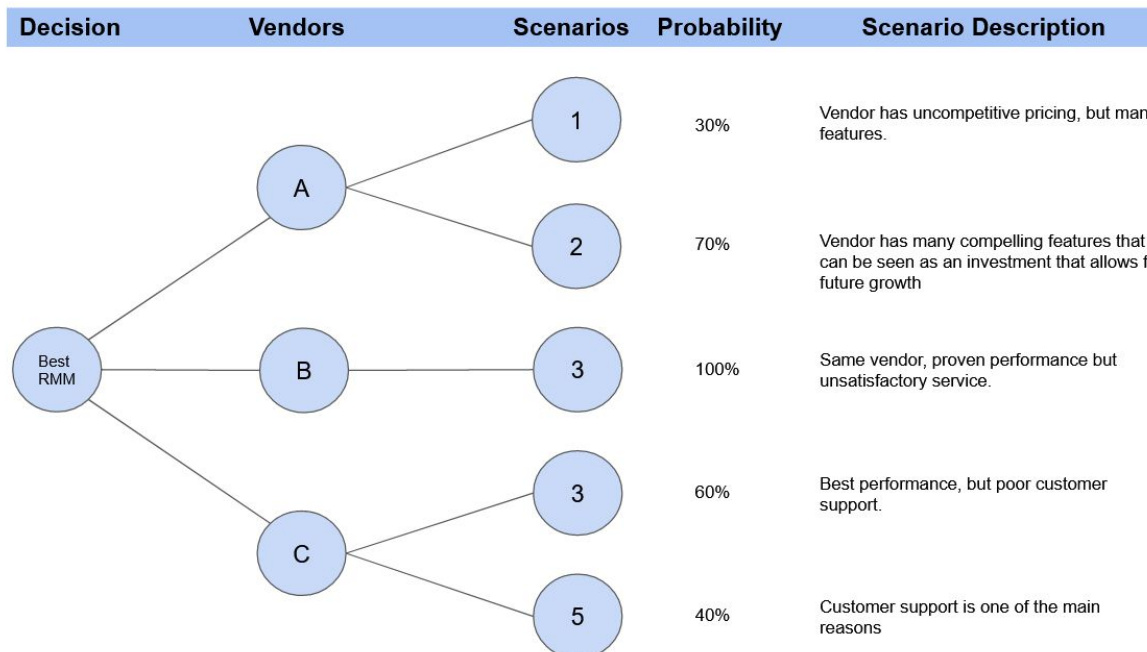
Issue Number	Issue Description	Date Identified	Resolution	Date Resolved
1	Sponsor wasn't able to meet at the specified time	10/13/20	Rescheduled meeting to a time that works for everyone	10/14/20
2				
3	Gathering trustworthy useful information proved a challenge	11/17/20	Made sure to note whether a site is sponsored by one of the RMM companies.	11/18/20
4	Sent sponsor incorrect link for final zoom meeting	12/2/20	Sent a new zoom link.	12/2/20

### Decision Scoring Matrix

	Datto	Kaseya	Ninja	Atera
Cost Per Endpoint	\$1.50	0	\$1-4	Free
Implementation Cost	\$1000	0		
Headquarters	Norwalk,	Miami,Florida	San Francisco,	New York City,

Location	Connecticut		California	New York
Customer Service	Good	Passable	Very Good	Passable
Usability	Good	Good	Good	Good
Interface	Good	Good	Good	Very Good
Antivirus	Very Good	Good	Passable	Passable
Automation	Very Good	Very Good	Very Good	Very Good
Multiplatform	Windows, Mac, Linux, iOS, Android	Windows, Mac, Linux, iOS, Android	Windows, Mac, Linux	Windows, Mac
Mobile	Yes	Yes	No	No
Cloud Deployment	Yes	Yes	Yes	Yes
Monitoring	Very Good	Very Good	Very Good	Very Good

### Scenario Model



## Deal Sheet

<b>Negotiation Deal Sheet</b>				
#	Term	Initial	Maximum	Goal
1	Software Cost		\$5 per Desktop \$10 per Server	\$3 per Desktop \$5 per Server
2	Implementation		\$0	\$0
3	Training		\$0	\$0
4	Implementation Date	6/1/2021	04/01/2021	6/1/2021

## RFP

### **1. Summary and Background:**

Xbirt IT Services was founded by Nick Deary 10 years ago. It is a Managed Service Provider (MSP) made to assist companies in managing and protecting their computers. The two primary RMM's they currently use are LogMeIn Central and Datto RMM.

### **2. Project Purpose and Description:**

While the two primary RMM's have been sufficient thus far, there are many weak points which need to be assessed. These issues pertain focally to the capabilities of the data managing software, and the reliability of customer service with RMM's. We will be looking into different RMM solutions for XBirt so they can provide better customer support to their customers and get better value from their software.

### **3. Project Scope:**

The scope of this project is to find alternative RMM tools and analyze their strengths and weaknesses. This includes comparison documents like matrices and graphs showing which tools have the best fit for XBirt's needs.

### **Request for Proposal:**

All proposals must be submitted by November 4<sup>th</sup>, 2020.

Proposals will be evaluated and shortlisted by November 11<sup>th</sup>, 2020.

Shortlist notifications will be sent to prospective companies by November 18<sup>th</sup>, 2020.

Selection will be finished by November 25<sup>th</sup>, 2020.

#### 4. Project Timeline:

Objective	Description	Date started	Dated completed
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Complete project Charter	Work with groupmates to complete project charter	10/22	10/22
Meet with sponsor	Meet with sponsor to discuss progress of objective	10/23	10/23

### 5. Proposal Evaluation Criteria:

In order to meet feasibility requirements, the proposed solution will be held to the following standards: RMM tools and included features/bonuses, cost per endpoint, antivirus options and performance, clean user interface, customer support . In addition, we will assess the vendors for the project to ensure that the business needs of XBirt are fully met.

Criteria	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
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<b>Approach</b>					
<b>Pricing</b>					
<b>Responsiveness/ Support</b>					
<b>Technical Ability</b>					
<b>Experience</b>					

### Implementation

Depending on if Nick wants to switch XBirt to a new RMM, implementation will vary. If Nick chooses to stay with Datto, he will not have to change or implement any new software. If he chooses another RMM tool like NinjaRMM, software implementation steps will have to be taken. This can vary from things like staff training to working with NinjaRMM to getting the software successfully working fully. There would be a transition period where both or no RMM tools are being used, which needs to be planned and accounted for. Some issues may require troubleshooting in the implementation process.

### Operations

If a new RMM is selected as the premier tool for XBirt, the vendor implementation team will work with XBirt to start implementation of the new tool as well as laying the framework for the operations phase. Support will need new RMM specific training for the new tool and learn how to transition end users of the tool who are resistant to changing. Implementing the tool can be held through workshop meetings with question and answer segments to ease the team into the operating phase. Project closeout reports should be made and filed correctly according to set guidelines, and the team will celebrate the success of the project!