WHITEPAPER

LogicMonitor

Increasing operational efficiency with monitoring best practices

As MSPs look to grow their revenue streams and scale their business, they increasingly face efficiency challenges, particularly when taking on more customers and managing headcount to support. In a recent report published by LogicMonitor, results demonstrated the increasing complexity of achieving goals and delivering excellent service to customers, including time spent on laborious manual processes and concerns about downtime.

This whitepaper will provide a guide to unlocking automation and next-gen capabilities with LogicMonitor to increase efficiency and your service delivery by following monitoring best practices in these four areas:

- **Portal Structure**
- **Automated Deployment**
- **Datasources**
- **Integrations**

Reality of Modern MSP

68%
of customers run hybrid of full-cloud environments

39%
of engineers time is spent on repetitive, routine task

100+
hours spent onboarding new customers

88%
have experienced downtime in the past year

95% of MSP leaders believe automation is necessary in order to focus on innovation

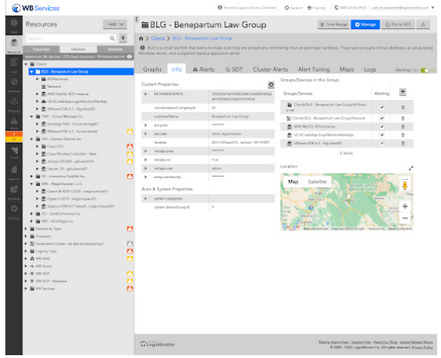
1. Portal Structure - to support rapid customer onboarding

When mapping out the service delivery for new customers, portal structure is a fundamental aspect of the customer experience. Structuring your portal with a consistent hierarchy will help you save precious time when identifying issues and streamline the process of granting customers access to view their data.

Structuring your resource tree and naming your device groups according to these tips will unlock other best practices that will help you automate common processes across customers.

Resource tree

Your resource tree is the primary structure through which you navigate to view your customers devices and data. Setting up a consistent structure will allow you to easily find the information you need as well as give you the ability to drive automation and repeatability across your client base.



Tip: Group all customers in a common root group rather than having them live in the root of the tree. While this may seem obvious, having all customers in a common group will help you with scalability. You can apply default templates to all clients and set up universal dynamic thresholds without editing individual datasources.

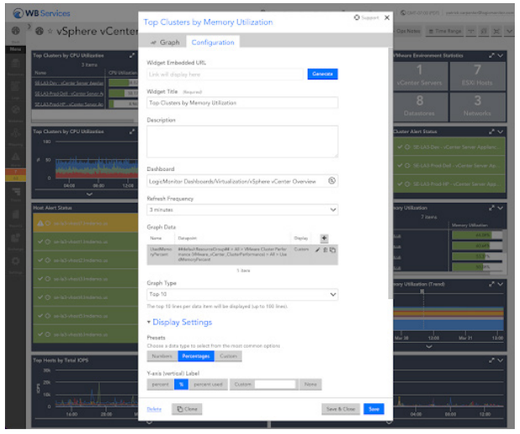
Tip: Use dynamic groups

After the auto discovery process runs, categorizing devices is important. Rather than grouping everything into a single “Resources” folder or manually dividing up devices, set up dynamic groups. Dynamic groups can be organized by device type, region, or naming convention. If you set this up consistently from the start, it will allow you to scale more quickly when onboarding new customers, or adding new devices for existing customers.

The size and structure of your company and your customers’ infrastructure will influence how best to organize your resource tree - for example, some MSPs might organize clients into groups by region, then utilize dynamic groups to further categorize each customers’ resources and datasources.

Configuring dashboards

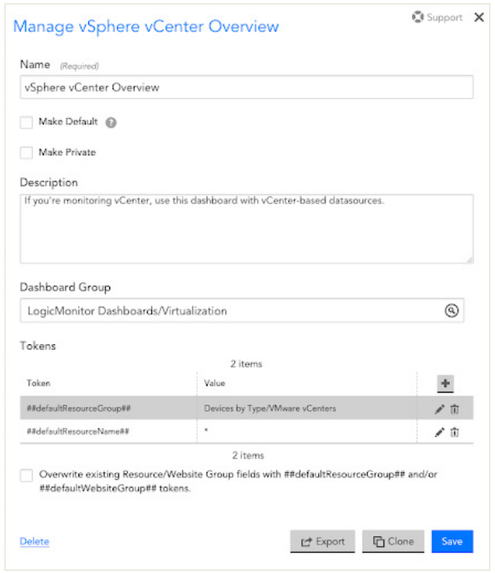
Dashboards should reflect customers’ environments and workflows. It is important to remember that you don’t need to create new dashboards for every new customer you onboard. Best practices include making dashboard templates that can be applied across your customer base.



Tip: Make sure dashboards reflect your customers environments and workflows. LogicMonitor offers hundreds of dashboard templates in the platform. After finding which ones work best for your customers, you can use tokens and widgets to make them easily repeatable for new customers, saving a significant amount of time during the onboarding process.

Tip: After building a dashboard, update token values to make it easily replicable. By updating the token values on a commonly-used dashboard, widgets can be added based on those token values. Then, creating the same dashboard for another customer is a simple matter of cloning the dashboard and updating the token values. All of this can be done from the “Manage” menu on a dashboard.

Taking it a step further, these steps can be automated by scripting the actions through the API to automatically set up new customers with access to the data they need, even with a large number of dashboards



Configuring alerts

Tip: Take the time to set up escalation chains and proper routing for every kind of alert. Structuring your customer portal according to these best practices will allow you to have better control of alerts for all customers. Identifying where alerts map to each customer is key for maximizing efficiency and reducing alert noise.

By taking the time to configure alerts for many different situations, you can plan for the future and ensure that customers can be onboarded directly into an intelligent and useful alert system.

Tip: Set up a list of alert rules that includes “catch-all alerts” that are followed across customers for every device. These catch-all alert rules ensure that the first alert action within LogicMonitor is to alert the MSP of important issues. Customers may or may not want to be notified of every alert. Setting these all-inclusive buckets at the root of the alert rules allows the MSP to build customer-specific alert rules on top of these to painlessly ensure that each customer gets exactly the level of visibility that suits them.

Tip: Leave space in your alert rule list to add additional rules later. Leaving room in the alert rule chain to add additional alerts enables you to have flexibility in your alert routing once it’s implemented, like adding custom rules for clients who need more information or have more integrations to be notified on.

More resources:

Monitoring Alerting Best Practices Guide

Best Practices for Effective IT Alerting

Escalation Chains

User provisioning

The last section of best practices around portal structure is to decide how to best grant customers access to their data.

Tip: Consider both internal users and customers when assigning roles and permissions. LogicMonitor uses a highly configurable Role Based Access Control (RBAC) model that can allow you to automate information access for both internal teams and customers.

Tip: Follow the rule of least privilege when assigning permissions
Whether your customers will interface with the portal or not, best practices for user roles and provisioning follows the concept of least privilege access. By granting each user access to only what they need for their role, you ensure the security of the platform as a whole, while providing only the required level of information appropriate for both internal teams and customers.

LogicMonitor offers four basic roles out of the box: Administrator, Ackonly, Manager, and Readonly. From there you can build additional roles for internal teams as well as each customer. Some clients might need read-only access to view dashboards while others might need additional access for their own teams. The key is to tightly align access with each team members' role.

2. Automated deployment - to create repeatability that enables scalability

Structuring your portals not only helps to simplify your operations but also sets up repeatable actions for multiple customers to maximize efficiency.

Customer folders

Tip: Set up dedicated folders to enable role-based access and specific reporting needs. The most successful service providers using LogicMonitor create a folder specifically for onboarding new customers. While we've seen an example of how to organize resources, this kind of repeatable organization can also be used on other parts of the LM platform such as Dashboards, Mapping, Reports, and even Collectors.

Deployment templates

Tip: Build an onboarding document for new customers
Working with your clients to create a document that answers basic questions will help the onboarding process go more smoothly by identifying which repeatable elements are needed for a new customer.

Based on the answers to this list, you can set up repeatable elements in each part of the platform. An example could be a business review report that many customers might want. If you already have a template built in your reports section, it can be easily replicated in the customer folder for any client that indicates they have a similar need.

Scripting setups

Tip: Populate properties for repeatable automated monitoring
Over time, these documents can help you to automate the deployment templates that will set up LogicMonitor based on your structure that matches the customer needs.

Many MSPs have found success with using their preferred infrastructure code tools to automate all of these processes so that monitoring can be set up for new customers seamlessly based on established templates and onboarding documents.

Similarly, permissions can be assigned to common roles, and different kinds of collectors can be pre-configured.

Dahboards with tokens

Tip: When creating custom dashboards, lean on tokens
When creating custom dashboards, you should use tokens to make them repeatable even if you think that the dashboard will be single-use. You never know when you might need to use it again, or when you might discover that the custom dashboard has broader use. Populating them with token values will ensure that you don't spend time recreating dashboards from scratch if they're needed again.

Datasources - to increase ROI on services

LogicMonitor has a growing library of hundreds of modules that contain datasources as templates to define how, when, and what data LogicMonitor should poll from different devices.

Retain customization

Tip: Follow specific conventions to support future proofing
The LM library of modules provides a starting point that can be customized for use within your organization. For example, an MSP might add different thresholds that suit their particular workflow.

LogicMonitor makes improvements to the collection of datasources every 3-4 weeks. Following best practices for customization will ensure that you don't lose your custom work when a module is updated.

Tip: Clone before customizing
Customization will be easier and will remain future-proof if changes are not done to the datasource itself. Sometimes changes can be made elsewhere. For example, if you want to change an alert threshold, that would be better done through the alert tab in the resources tree. Other customizations can be done at the client folder level. If a datasource itself needs to be customized, the best practice is to clone it before making adjustments so changes won't be lost in the case that LogicMonitor makes updates to datasources.

By renaming and adjusting the comments in both the cloned and original version, you can disable the original datasource and run the customized one without problems.

DIY modules

Tip: Discuss opportunities with your development team
Some MSPs have found success with developing their own proprietary datasources that can give them added market value. To find out where you might be able to add custom value, make sure you communicate regularly with your development team to identify opportunities to build new tools to serve your customers.

Maintenance schedules

Tip: Identify updates to datasources to prevent future issues
Staying on top of datasource updates prevents a backlog of updates and ensures that LogicMonitor is monitoring everything for you and your clients with the most updated best practices. Create a cadence that makes sense for the size of your MSP.

When setting up your own maintenance schedules, communication to your customers is key. By using the scheduled downtime function of the portal, you can prevent customers from getting numerous alerts by seeing and resolving them first

LM Exchange

Tip: Publish DIY modules to promote your own offerings
If you've created your own modules you can promote them. MSPs sometimes create DIY solutions for custom offerings, such as monitoring an infrastructure containing non-traditional equipment. These modules are the intellectual property of your business and storing them internally can help you keep track of improvements and iterations.

But where possible, LogicMonitor encourages users to publish some of these custom modules in the community exchange, where it can increase your company awareness and even attract customers looking for similar specialized services.

LM integrations

Just as with datasources, LogicMonitor continually expands the kinds of workflows that can be monitored through integrations that can provide tremendous value to MSPs.

From ticket management systems to workflow integrations like using LM integrations can streamline the entire lifecycle of incidents. There are other integrations that can help MSPs improve communication with customers during situations like an outage.

- Out-of-box integrations - extended support within the LogicMonitor platform
- Workflow integrations - new integrations to extend outside ticket management
- Ticket Management -support the entire lifecycle of tickets for incident management resolution
- Customer Integrations - explore integrations with your customers to support their internal processes

Following monitoring best practices with LogicMonitor ensures the highest level of service for your customers, allows you to onboard and scale more quickly. By ensuring that your platform is set up according to best practices, you can start to automate routine processes, customize services to customers.

About LogicMonitor®

LogicMonitor®'s SaaS-based observability and IT operations data collaboration platform helps ITOps, developers, MSPs and business leaders gain visibility into and predictability across the technologies that modern organizations depend on to deliver extraordinary employee and customer experiences. LogicMonitor seamlessly monitors everything from networks to applications to the cloud, empowering companies to focus less on troubleshooting and more on innovation. For more information, visit www.logicmonitor.com.

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