



XPERTECHS Job Description

Job Title: Design Desk Specialist	Location: Ellicott City, MD
Department: Service Delivery & Operations	FLSA Status: Salary, Exempt
Reports To: President	Compensation: Base Pay + Bonus; includes medical, STD, LTD, life insurance, 401k and vacation plan

About XPERTECHS

XPERTECHS is a managed IT services, cloud solutions and consulting firm ranked among the top 200 IT Managed Service Providers in North America.

Our team maintains the highest levels of industry certification in all aspects of business-related IT and operates a full network support and operations center. We specialize in solving complex IT design and infrastructure issues while maintaining a “trusted advisor” relationship with our clients.

We're doing well, and we're growing - and now looking to add another great person to our (already awesome) team.

The Position

The core purpose of the Design Desk is supporting the vCIO and Professional Services delivery areas. There are many reasons to support the five major delivery areas with Design Desk.

- Clients need changes to their technology over time. Hardware and software implemented becomes out of date and requires rejuvenation.
- Changes to technology need planning and implementation. Upgrades differ and need due diligence before a proper recommendation.
- Design Desk researches, plans, and writes implementation plans for new technology.
- Adds to client strategy by creating thought out, well-structured proposals and work plans.
- Delivery area resources have finite time: TAM performs alignment reviews, vCIO builds the business relationship, and Professional Services implements projects.
- A contribution to a backlog of non-recurring revenue helps keep Professional Services billable. Time expires after project completion. A backlog keeps NRR moving by having profitable non-recurring revenue services in the queue.

Essential Duties and Responsibilities

To understand the Design Desk, it is best to detail the day-to-day responsibilities. The role plays an important part in the vCIO process due to constant interaction. The vCIO leans on Design Desk to generate accurate proposals with their vision for customer success.

Working With Technical Teams

Design Desk understands the technology available and how it operates in a customer's environment. A technical background is necessary to comprehend the technology recommended. On occasion, it may be necessary to consult with other technical teams for advice.

- Researching solutions may need input from Professional Services, TAM, or Service Desk. Finding the right solution for a client may rely on experience.
- The amount of time required to implement a project may be variable and not the same across clients. Technical teams may need involvement for special requirements even when aligned with company standards.
- Equipment like hardware, software, or services are not always a one size fits all solution. Consulting with other delivery areas can find the right solution for specific needs.
- The Design Desk ensures the chosen solution aligns with the customer's business goals. Solutions may be routine across customers and some will need customization.

Working with the vCIO

Design Desk and vCIO work side by side like TAM and vCIO. A vCIO handles the client's business goals and plans out strategy over the short and long term. Budgets planning 1-3 years in advance plays a big part in designing solutions. Design Desk must be aware of customer goals and budgeting when crafting proposals.

- A business case for each solution maintains technical alignment with each customer. Cookie cutter solutions work for customers who are not dependent on their technology. A customer that understands its importance requires more involvement.
- Design Desk needs to identify the area of necessity rather than creating a proposal around a specific technology. Accurate identification ensures researched solutions are designed and implemented right the first time.
- A vCIO will multi-thread and work with many clients at any given time. Design Desk must learn to meet deadlines from priorities handed down by the vCIO. This requires a non-linear work method and the ability to work on many proposals simultaneously.

Creating Project Proposals

The anatomy of a project proposal consists of many areas: detailed steps, the time required, and resources necessary. Accuracy of time and materials is important because it determines the cost of projects. Project proposals will contain at least of four sections: steps, timeline, equipment, and resources.

Detailed Steps

Designing a project plan includes every step required for a successful implementation. Listing resources, technology, and a timeline are useless without proper steps of implementation. For example, replacing a server should list all requirements before, during, and after installation. Completing steps in the right order will determine the success of the project.

Each step should include enough detail so an implementer will need little to no clarification by the Design Desk. A Professional Services Engineer possesses the skill necessary to implement each project. Customers may need certain customizations depending on their environment. Situations like this are why an up to date Standards Library must be prioritized. Each client will have use cases for technology which makes detailed steps important.

Time Requirements

Each proposal calculates the time needed to prepare, plan, install, and close out a project. Some project timelines may be standard installations like switches and firewalls. Others may need customization dependent on the complexity of a customer's environment. A timeline can split into two directions when allocating it for a project.

- Over-estimating time will see a project finished sooner than expected. High costs that deter customers from a future investment is something to avoid.
- Underestimating time will cost the TSP money by allocating resources longer than necessary. It will prevent other billable projects from starting.

When estimating time, key variables need consideration. It is best to estimate extra time should anything go wrong (scope creep), but not overestimate.

- **Project management time:** Time used by the project manager for a formal handoff between the vCIO and Professional Services team. It also includes planning the project, assigning resources, and scheduling implementation.
- **Implementation time:** Project implementation time according to the proposal. If planned by Design Desk, vCIO, and project manager, the estimated time should be enough. Even with scope creep, handling all assumptions before the start should remain accurate.
- **Standby support:** Support for small issues should be set aside after completion. Allocating time prevents rushing into the next project before others finish.

A small block of time should be set aside at the end of each project to close it out. Project closure includes customer confirmation that everything is complete as planned.

Hardware/Software/Service Requirements

Projects need hardware, software, or services. A proposal includes a detailed listing of items along with costs. Costs change over time so budget these items in advanced using best estimates. Be sure to build in markup to match your non-recurring revenue margins (30% or more).

- Hardware includes physical devices that are upgraded, replaced, or installed at a customer's location. Examples include virtual hosts, network switches, wireless access points, and workstations. Quoted hardware adds a markup to match your non-recurring revenue goals. Markup prevents losing money, selling at cost, and building a price cushion in case of fluctuations. A proposal should guarantee hardware pricing for a limited amount of time. Price fluctuations over the course of a few months could result in a loss.
- Software is anything installed from physical media or downloaded to a workstation or server. Examples include operating systems, office suites, and accounting applications. Some software used in business environments need licensing or support contracts. Extended support is a major consideration when proposing large software upgrades. Software best practices should include the following.
 - Currently supported by the manufacturer and not end of life.
 - Have a valid support contract through the manufacturer or third party.
 - Have full and proper licensing for the customer's environment (no shareware or demos).
 - No pirated or stolen software.
- Services are non-physical hardware or software and provided by a third party. Common examples are cloud services (email, accounting, ticketing), phone, internet, and payroll. Most cloud services are a subscription model and have a low monthly fee. The major benefit of a subscription model is the loss of a large initial investment. Monthly cloud services provide the convenience of off-site hosting. Proposals should compare the pros and cons of cloud services to provide a Time-to-Value estimation. Analyzing the monthly model versus the onsite/upkeep model is a great method of showing the total cost of ownership.

Resource Requirements

Resources refer to personnel, vendors, or stakeholders needed to complete a project. A project needs resources assigned to complete tasks, technical or not. Professional Services has engineers on hand that dedicate themselves to

this process. They can divide resources at any time depending on the complexity of a project.

- Technical resources are engineers that install, maintain, or upgrade technology. The resource assignment matches the complexity of the project. A high-level project should involve a highly-skilled engineer. Tasks, like setting up workstations or installing software, can be delegated to entry-level technicians.
- Non-technical resources refer to no installation or maintenance of hardware or software. Projects may need an asset inventory documented or converting paper documents to PDF. In these scenarios, high-level engineers are not necessary.
- Vendors or manufacturers may need involvement with the implementation of technology. A high-level engineer may need a vendor for specific integrations or configurations.

Create Proposal Templates

Design Desk will mass produce proposals to create a backlog of work for Professional Services. Projects may follow the same format, include similar resources, and even labor. Proposal templates allow for efficient production to prevent starting each from scratch. Managing a templates library streamlines the proposal creation process.

Ordering Process

When it comes to consolidating functions in a role, the Design Desk does that. Buying technology and maintaining relationships with distributors or vendors falls under Design Desk. Consolidating responsibility establishes a single point of contact to request pricing and availability from suppliers.

- Distributor relationships provide direct contact with vendors who supply pricing and availability. Many organizations exist that supply IT products from their warehouses. It prevents searching for product pricing from third party sites. Most vendors assign an account manager to assist Design Desk with building proposals.
- Hardware purchases like firewalls, switches, and workstations can be standardized across many clients as part of technical alignment. Workstation build templates provide a quick solution without custom building one every time. Servers potentially need customization for most applications.
- Version maintenance is a factor when designing software solutions for a customer. Many software titles have transitioned to web-based versions and switched to subscription pricing. Understanding physical and cloud versions is vital when upgrading or implementing. Some cloud versions cannot integrate with on-premises versions.
- Licensing needs a higher level of understanding to interpret changes and legal restrictions. Some manufacturer license schemes are complex and have requirements before purchasing. Most third-party resellers have licensing specialists to sort out confusion with agreements.
- Gross margin on purchased hardware is a factor in non-recurring revenue. Hardware for projects should have a markup in accordance with gross margin goals. If the goal is a 30% margin, the hardware will have this added to the cost. For example, a server with a cost of \$3000 should have a markup to the customer at \$3900 to create a 30% marginal gain. Design Desk is accountable for ensuring gross margin remains consistent across the board.

Key Vendor Relationships

Establishing and maintaining vendor relationships creates flexibility when quoting technology in a proposal. Vendor relationships allow for direct wholesale pricing from a reseller. Resellers tend to have their own warehouses and ship products direct. This strategy allows them to bypass typical processing delays through retail outlets. Vendors may even assist with marketing, branding, or training of certain products.

- Manufacturers may offer product training for servers, network equipment, or other technology. Training received from the source is well worth the effort, whether free or not. This will develop the best practices and standards for the Standards Library.

- Vendors keep technology information up to date as they develop or release. They announce public availability or even beta testing opportunities. Marketing opportunities like sponsorships or co-branding original content also become available.
- Design Desk will become the single point of contact for outside vendors. A single point of contact on the TSP side benefits both parties. A strategic business relationship forms like the vCIO and decision makers.

Tools

Proposals need an assortment of tools to create, manage, and deliver. Using tools for the sake of using them would be inefficient. It is best to use what may already be in place and work up to something that would be all-encompassing.

- Professional Services Automation (PSA) and Customer Relationship Management (CRM) tools are great starting points when drafting proposals. Customer details, asset inventory, and project history are accessible through these systems. Providing self-service analysis of client support history maintains a smooth process.
- Quotes made in a word processor or spreadsheet can be useful. Advanced quoting tools provide extra features and streamline the proposal creation process. They allow for a text description and pull product data from vendor databases. Some even include the digital signing of proposals to speed up the approval process. Tools can be costly but pay for themselves with a high turnover of proposals generated.

Managing Design Desk

Generating proposals requires discipline since it pulls in many directions at once. It is important to rank and organize tasks to prevent bottlenecks and delivery delays. Focusing on important tasks takes precedence over external affairs.

- Beware of multitasking many proposals without finishing them. It is possible to start proposals without finishing them and not meet deadlines.
 - Set a start and end date on your best estimation of completion time.
 - Block off time on your calendar to dedicate to a particular proposal.
 - Avoid interruptions to meet deadlines.
 - Do not over promise on delivery dates.
- Focus on and organize tasks after vCIO recommendations. A vCIO should decide the priority of a proposal and assign it to the Design Desk. Complete tasks on importance rather than the length of time to complete.
- Standardize miscellaneous products to push proposals through the system faster. Configurations for hardware do not need many variations. For example, choose two workstation builds and quote them on customer needs. This allows for fast quote generation and ease of ordering from distributors.

Requirements

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- **Education and/or Experience:** This position requires a minimum of an Associate's Degree (with a Bachelor's degree preferred); at least 2 years' recent NOC Service Desk experience to the small or mid-sized business market; or an equivalent combination of education and/or experience. Must be able to effectively communicate in specific terms about technologies used by our clients, including Windows Server, Microsoft Exchange Server, HP Servers, Router/Switches, Firewall Appliances, VoIP and IP environment, and CAT5e/CAT6 Infrastructures.



- **Knowledge, Skills and Abilities:** The Network Operations Specialist must have a strong aptitude in OS repairs, spyware and virus management, hardware, software, remote backup, desktop optimization and troubleshooting. Must also have the ability to read computer instruction manuals, utilize Google Search and comprehend directions therein in order to remedy minor computer equipment malfunctions.
- **Physical Demands:** While performing the duties of this job, the employee is regularly required to communicate with and present information to others and access information using a computer for several hours at a time. Employees must have mobility throughout the office and may occasionally drive or ride up to 30 miles to other service locations.
- **Emotional Demands:** The employee must be emotionally mature and be able to handle difficult and complex client and work-related situations. Candidates must possess strong problem solving, conflict resolution, and interpersonal skills. They must be self-driven and possess a positive mental attitude.
- **Client/Relationship Management:** The Network Operations Specialist establishes and builds relationships with clients. Applies knowledge to the business and provides personalized, value-added service. Demonstrates willingness to meet or exceed needs of clients by pursuing improved courses of action; delivers products and services that best serve client needs; uses client feedback as a basis for improving service and performs necessary follow-up work without being prompted.
- **Collaboration/Teamwork:** The Network Operations Specialist creates commitment to common goals; identifies competing interests and finds ways to balance them; values contributions of all team members and other constituencies; values team accomplishments over individual accomplishments; leverages others' strengths and experiences to achieve team goals; co-operates with colleagues and shares resources.
- **Intellectual Demands:** Excellent written and verbal communication skills are essential, as well as effective organizational, multi-tasking, and prioritization skills. Candidates must be able to read, analyze, and interpret general industry periodicals, technical procedures and governmental regulations. They must be able to interpret a variety of instructions furnished in written, oral, diagram, or schedule form. They must be able to effectively present information and respond to questions from clients, vendors, and employees.

All job requirements are subject to possible modifications. This job description in no way states or implies that these are the only duties to be performed by the employee occupying this position. Requirements are representative of minimum levels of knowledge, skills, and/or abilities to perform this job successfully; the employee must possess the abilities or aptitudes to perform each duty proficiently. Continued employment is on an "at-will" basis.

Employee must be able to relate to other people beyond giving and receiving instructions: (a) can get along with other co-workers or peers without exhibiting behavioral extremes; (b) perform work activities requiring negotiating, instructing, supervising, persuading or speaking to others; and (c) respond appropriately to constructive criticism from a supervisor.

Education/Certifications

University Degree and/or related Technical Diplomas are encouraged



Working at XPERTECHS

In between our efforts, triumphs, late nights, and dedication to our clients, comes a fast-paced, team-oriented and friendly family culture that helps drive the success of our organization. An open concept office and huddle “style” meetings help create a casual and collaborative atmosphere. Neckties are cut loose on day one to help emphasize our unique philosophy. Staying fast, efficient, and flawless is our competitive edge. Our team-first approach extends far beyond typical business hours. XPERTECHS runs multiple social events throughout the year and supports both employees and their families. We relax with trips to the ballpark, annual company outings, and frequently catered lunches! A team that plays together wins together.