



LEVERAGE IT'S

Client Satisfaction Report 2023

Discover the key insights from our annual client survey
and service improvements coming in 2023

Table of Contents

1	Executive Summary
2	What Are the Five Key Service Areas? An Introduction
4	Who Took The Survey and Methodology
5	Key Findings
7	The Five Service Areas
8	Service 1: Technology roadmapping and strategy
11	Service 2: Business applications
14	Service 3: Cybersecurity
18	Service 4: Business technology infrastructure
21	Service 5: Backup and data protection
24	How Likely Are Our Clients to Recommend Us?
28	Key Takeaways and How We Plan to Improve
30	Conclusion: Service Enhancements Coming in 2023
31	Additional Resources
32	Let's Talk



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Leverage IT



1

Executive Summary



Client feedback is vital for any organization. If you've been a Leverage IT client for a while, you know we conduct regular planning and advisory meetings with clients to gather input. We also send you a survey requesting feedback once a project or ticket closes.

What you may not know, however, is that Leverage IT considers itself a client service organization first and a technology company second. Client satisfaction is our number one goal – providing excellent IT service is simply the means by which we accomplish that goal. However, we realize our feedback collection process could be improved. While the advisory meetings and quick surveys we conduct are important, they're not enough to truly understand how clients view our service. That's why in late 2022, we conducted our first annual survey to gather in-depth feedback and improvement recommendations from our clients. The report you are about to read shares the results of that survey.

Leverage IT's Client Satisfaction Report 2023 is an annual perspective of our service in the eyes of our customers. It provides clients and prospective clients with insights into Leverage IT's performance across its five core service areas: technology roadmapping and strategy, business applications, cybersecurity, business technology infrastructure, and backup and data protection.

This report also shares upcoming improvements to our services and assigns us a net promoter score (NPS) – considered the gold standard of evaluating customer satisfaction – to provide a more objective perspective of our performance.

2

What Are the Five Key Service Areas? An Introduction

If you're new to Leverage IT or only use a few of our services, you may be unaware of all our technology solutions. Below is a summary of our five key service areas, describing each one and its benefits. We'll dive deeper into these services and explore client feedback in "The Five Service Areas" section of this report.



1 - Technology roadmapping and strategy: Navigate Services

The technology roadmapping and strategy aspect of our Navigate Services includes a dedicated Certified Digital Advisor who will learn the ins and outs of your IT infrastructure, processes, and business goals. With this knowledge, the Certified Digital Advisor then designs a detailed IT strategy that aligns with your organizational goals and provides guidance on technology projects to reap maximum ROI.



2 - Business applications: Navigate Services

We work with your business process experts to clarify the goals of your new application and map the efficacy of your current solution stack. The objective is to align the application's new features and functions with your business needs. To ensure the application is delivering ROI, we regularly touch base with you on your experience with the new solution.



3 – Cybersecurity: Shield Services

To keep your organization safe from bad actors and ransomware, we offer a suite of cybersecurity tools, multiple security layers, and staff training. All solutions are applied by cybersecurity experts who have years of experience and a deep understanding of best practices.



4 – Business technology infrastructure: Pivotal Services

We help implement the right technology infrastructure to support your applications, business needs, and overall productivity. As part of the service, you receive a clear technology roadmap to help you meet your unique operational and security requirements.



5 – Backup and data protection: Secure Services

You receive automated, scheduled backups of all your business data, both on site and in the cloud. In the event of a disaster, these backups combined with a business continuity plan provide you with a step-by-step, turnkey recovery that quickly restores all your data to exactly how it was. To keep backups up to date and provide peace of mind, the service is ongoing and follows data security best practices.



3

Who Took The Survey and Methodology

The survey was conducted among middle managers and executives across our entire client base. Our clients consist of companies of all sizes in a variety of industries – including manufacturing, financial services, legal, insurance, construction, logistics, and others – located throughout Sacramento, Reno, and the United States.

To all our clients who responded to this survey, a sincere thank you. We appreciate your business and the time it takes to complete a survey like this. We hope you enjoy learning about the results and how we intend to improve your service.



4

Key Findings

Below is a summary of the key findings across our five services areas.



Technology roadmapping and strategy

- While executives and middle managers are satisfied with the service, many clients are unaware of the full extent of our technology roadmapping and strategy planning. This means there's an opportunity to help clients more clearly develop an IT strategy to achieve business goals.



Business applications

- Executives and middle managers can use help in creating a big-picture vision for how applications are utilized in their organization. Leverage can work with clients to develop this plan and then standardize and reinforce the right use of applications.



Cybersecurity

- Despite our clients being confident in our cybersecurity services, they seem to be unclear on many security risks and how their businesses are currently protected. There is also a lack of understanding on additional layers of security that can decrease risks. These gaps provide us with an opportunity to better communicate what security tools and layers are in place, and advise clients to implement additional layers where necessary.
-



Business technology infrastructure

- We need to encourage executives, middle managers, and other employees to be more proactive about their IT infrastructure. If we help our clients plan better, we can reduce the frequency of infrastructure issues disrupting staff productivity (e.g., computer crashes, internet outages, etc.)
-



Backup and data protection

- Executives and middle management understand the value of backup, business continuity, and data protection as a service. As more of our clients migrate to cloud-only environments, we must emphasize the importance of protecting data stored in the cloud.
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The Five Service Areas



SERVICE 1

Technology roadmapping and strategy

Accomplish your business goals. Achieve a better ROI on projects.

Every business has goals. What separates the organizations that achieve those goals from those that don't? Roadmapping and strategy may be the answer. As technology plays an integral role in the productivity, operational costs, and security of any business, a technology roadmap and strategy are vital to accomplishing business objectives.

What is a technology roadmap?

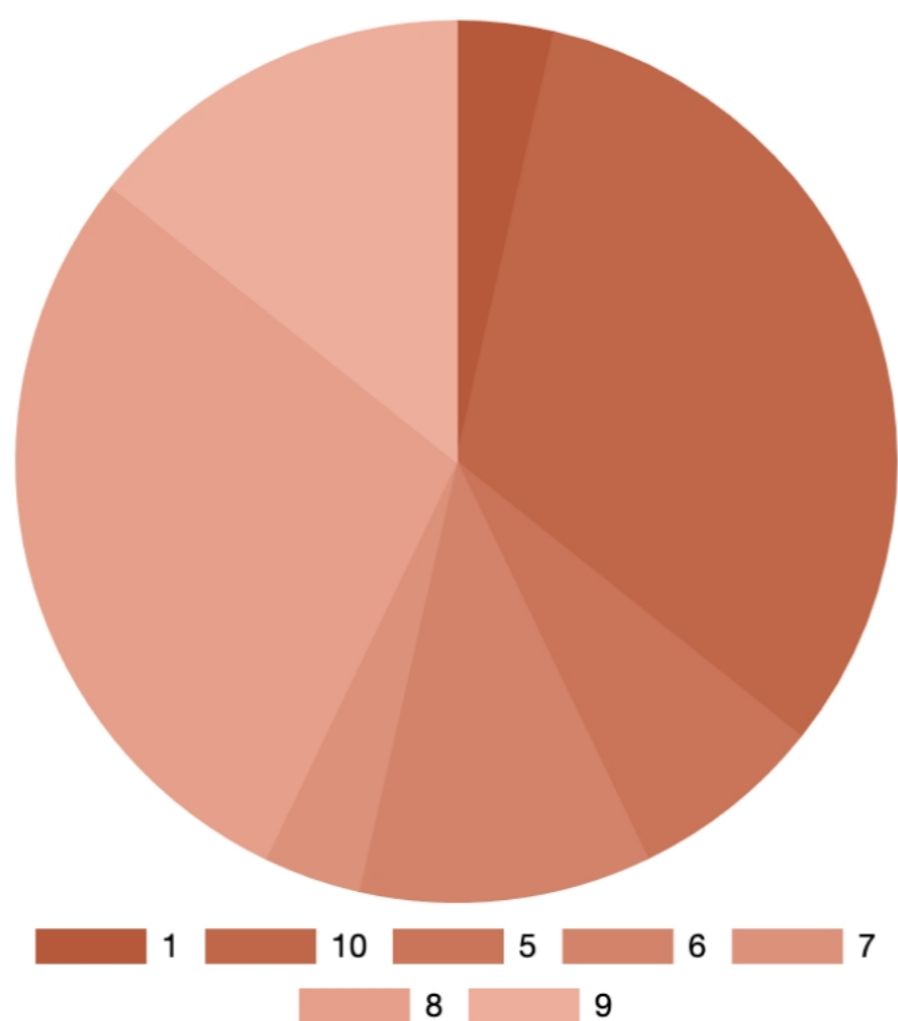
A technology roadmap connects your strategic goals to the people, process, and tools required to achieve those goals. It then identifies the changes your business must make to move forward. Prioritization and consistency are key. You can't accomplish every goal and an inconsistent effort will cause projects to stagnate and go over budget. A focused, consistent technology roadmap keeps your projects on track.

Why is it important?

A technology roadmap supports your strategic objectives. If you're faced with a choice between two new technologies that promise to streamline your next project, the roadmap can inform your decision, helping you make the right choice to reach your goals. An unclear technology roadmap, however, can result in poor project planning that leads to missed deadlines and a weak ROI. A technology roadmap keeps your business focused, returns value for every dollar spent, and helps you stay ahead of the competition.

Survey results

We asked our clients: "How confident are you in your company's technology roadmap and strategy services?"



Service Confidence Score Scale:

Clients were asked to rate their confidence on a scale of 0-10. Below are the ranges and what they indicate:

- 0-5 = Low confidence
- 6-7 = Medium confidence
- 8-10 = High confidence

Label	%
10	32
8	28
9	14
6	10
5	7
7	3
1	3

Confidence in Leverage IT's technology roadmap and strategy services:

- ✓ 74% of clients indicate a high level of confidence
- ✓ 87% indicate a medium-high level of confidence

We asked our clients to leave additional feedback about their technology roadmap and strategy.

Here are some of their comments:

<p>“ I am confident in the strategy but a little less confident that the necessary training will follow.”</p>	<p>“ Concerns come from the company side, just having the budget to meet the life cycle needs.”</p>	<p>“ Your roadmap is great, but getting us to adopt it will be the challenge.”</p>
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Summary of results:

The current state and future of the service

Survey comments reveal that our clients have confidence in Leverage IT's current service. Middle and executive management understand that we're concentrating on enabling a consistent roadmap, and our documented best practice, prioritization for them, and regular planning meetings are effective for clients. However, there is a gap and an opportunity to develop a clearer client business technology roadmap. For this reason, we've enhanced our client technology roadmapping and strategy service, also known as [Navigate Services](#).

The service now provides input, insight, and communication on the alignment to business technology best practices. We have built more services to help you develop alignment with strategic direction, business goals, and your departmental area's people, processes, and technology abilities.

How do we deliver these additional services? We assign you a Certified Digital Advisor who will learn the ins and outs of your IT infrastructure, process, and goals. Your Certified Digital Advisor will help you develop a unique plan to achieve a maximum ROI from your technology investment. If you sign up for our Managed Services, you get a Certified Digital Advisor that provides the base best practice alignment consulting at no extra cost. There are advanced consulting and advisement services that can be added to your services to expand the roadmapping, technology project portfolio management, and project delivery work.

The Navigate service brings focus to your technology roadmap. With it, we'll help you carefully select and prioritize the right technology modifications needed to meet your strategic goals. We'll then help you develop a plan to inform your staff of the changes and how the upgrades will impact them.

SERVICE 2

Business applications

Your application choices determine your company's productivity

Business applications are vital to your organization's success. You rely on them to get work done, and your application choices have a direct impact on your company's productivity. Decisions like choosing between Microsoft 365 and Google Suites, or Sage and Quickbooks have a deep impact on your people, training processes, operational costs, support, and entire organization. There's a lot at stake. Once you implement an application, it's hard to reverse course. The wrong decision could have a negative impact on your company's efficiency, staff morale, and growth.

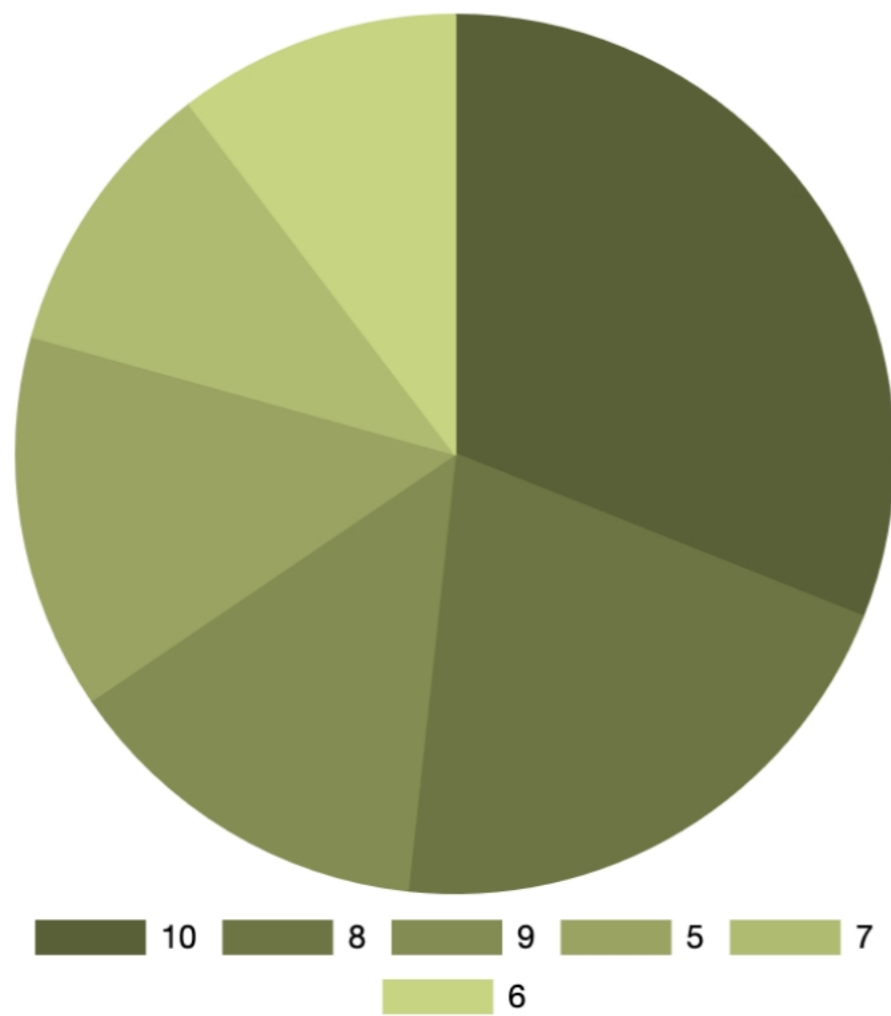
When new applications fail, it's usually because the bigger picture wasn't considered. Does the new application align with the strategy roadmap? How will it affect the business's people and processes? Will it integrate with other applications? Answering these questions before installation is critical. Failure to do so can lead to data migration and compatibility issues that grind your organization to a halt, causing downtime and frustration company wide.

The benefits of an implementation strategy

When business applications are implemented strategically, the process goes much more smoothly. You'll have a better understanding of what the application is and a higher likelihood of completing the implementation on time and budget. You'll also get buy-in from affected departments and employees in advance. This fosters confidence in the solution and a more rapid adoption of the tool among staff. The result? Your business can move forward toward more growth and profits.

Survey results

We asked our clients: "How confident are you that your business applications (software) are providing for your work needs?"



Service Confidence Score Scale:

Clients were asked to rate their confidence on a scale of 0-10. Below are the ranges and what they indicate:

- 0-5 = Low confidence
- 6-7 = Medium confidence
- 8-10 = High confidence

Label	%
10	31
8	20
9	13
5	13
7	10
6	10

Confidence in Leverage IT's business application services:

- ✓ 64% of clients indicate a high level of confidence
- ✓ 84% indicate a medium-high level of confidence

We asked our clients to leave additional feedback about their business applications (software).

Here are some of their comments:

“

This is on our side – we need to work on using the software we have to full capacity.

“

We are always looking for software to enhance our workflow but are often unsure about what is available.

Summary of results:

The current state and future of the service

Overall, our clients are happy with our business application services, and they have access to the software they need. Clients are interested in how applications can optimize their businesses, and we see an opportunity to help them set better standards in this area. Survey results revealed our clients are often unsure about which tool is best used for a given task.

For example, consider the functionality of Asana, Outlook, and Slack. All three are communication tools that enable you to message colleagues or partners. If a business has all three of these applications, in which situation should you use each tool? Asana is best for messages that relate to a particular project. Slack is a more casual communication tool best for quick messages, as if you were walking by a coworker's desk. And email is best for longer messages or to parties outside your organization.

The differences in the above tools are subtle. As such, we see an opportunity to help our clients architect a plan for application use — that is, standardize the correct use of tools, reinforce the correct use, and ultimately align the right application with the right business function. When you use an application for the right purpose, your business will see gains in productivity, efficiency, and peace of mind.

SERVICE 3

Cybersecurity



Prevent financial loss, reputational damage, and legal repercussions

Cybersecurity incidents have become normal. Nearly every week, a major company is in the news for a data breach, phishing emails land in employee inboxes, and Microsoft and other companies release patches for the latest vulnerability. In today's world, we're under a constant onslaught of cyberattacks.

While SMBs may think they're too small to be targets, statistics say otherwise. According to [Verizon's 2021 Data Breach Investigations Report](#) [1], SMBs are the target of 46% of all breaches, and were hit with [more than 700,000 attacks in 2020 alone](#) [2], causing 2.8 billion dollars in damages. If the financial risks of weak cybersecurity aren't enough, compliance is another issue. A data breach could have legal and reputational repercussions for your business, resulting in fines, lost customers, and even jail time.

Cybersecurity is preventative healthcare for your business

Contrary to popular belief, effective cybersecurity is about decreasing risk, not eliminating risk. The latter is impossible, as cyberthreats constantly evolve and zero-day attacks aren't going away. There will always be some risk. However, decreasing that risk reduces your chances of becoming a victim.

Think of cybersecurity as preventative healthcare for your business. Just like a nutritious diet and exercise improve your productivity and overall well-being, a proactive cybersecurity solution improves the health and longevity of your business. Physical well-being is often experienced as a lack of disease and a healthy cybersecurity solution is no different: you'll experience a lack of security incidents, freeing up your business to focus on goals instead of cleaning up the toxic, lingering effects of a cyberattack.

How to fight cyberthreats

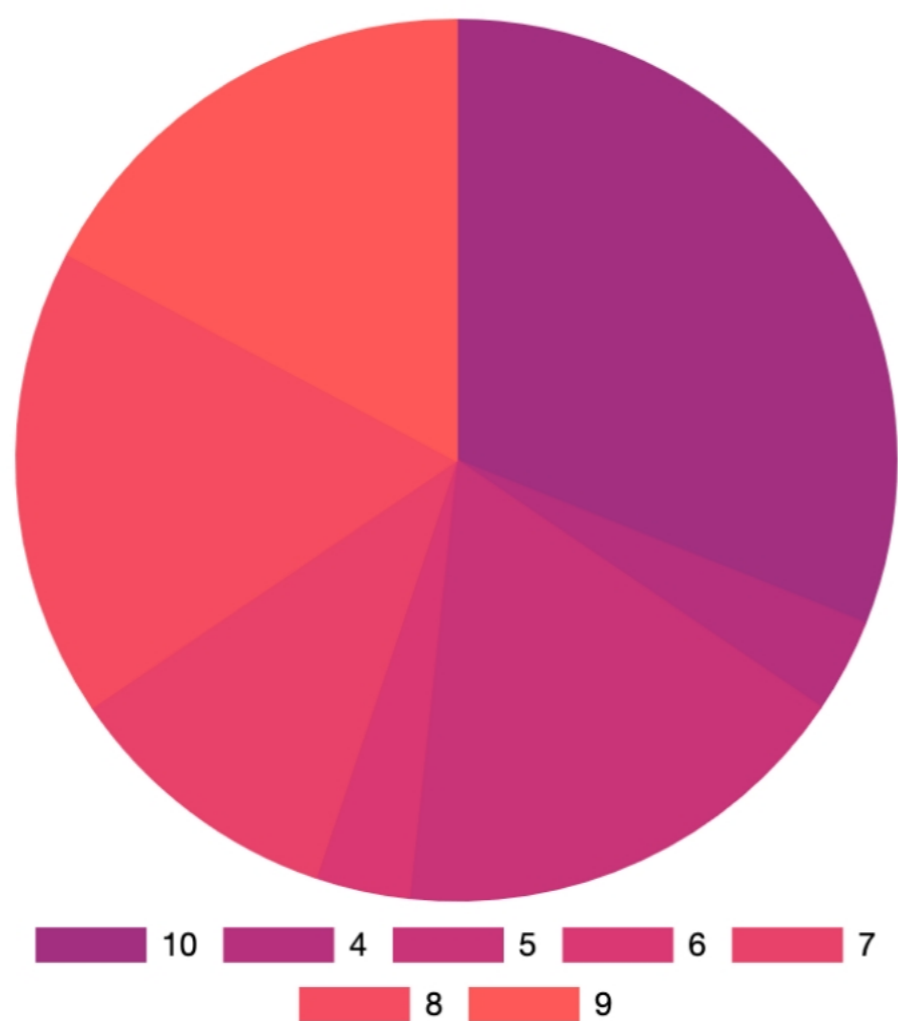
Protecting your business begins with understanding your IT infrastructure. You must become aware of its vulnerabilities, how to address them, and the different security layers needed to safeguard your organization. Security layers are important because more layers typically mean better protection. However, as with all cybersecurity defenses, these layers should be reviewed regularly because the risks are constantly changing.

While awareness of how your cyber defenses work is important, action is critical. Train your staff how to identify and prevent threats, consistently explore the newest risk mitigations, and explain to business leaders how your cybersecurity efforts decrease your company's risk. Following these guidelines will lead to the preventative cybersecurity solution that improves the well-being of your organization.



Survey results

We asked our clients: "How confident are you that your business is protected from hacking, phishing, or malicious activity?"



Service Confidence Score Scale:

Clients were asked to rate their confidence on a scale of 0-10. Below are the ranges and what they indicate:

- 0-5 = Low confidence
- 6-7 = Medium confidence
- 8-10 = High confidence

Label	%
10	31
9	17
8	17
5	17
7	10
6	3
4	3

Confidence in Leverage IT's cybersecurity service:

- ✓ 65% of clients indicate a high level of confidence
- ✓ 78% indicate a medium-high level of confidence

We asked our clients to leave additional feedback about their cybersecurity.

Here are some of their comments:

<p>“ I'm confident but I don't really know whether the protection we have is adequate.”</p>	<p>“ The occasional spam/ phishing emails that slip through and are opened by staff is slightly concerning.”</p>	<p>“ We're only as good as our staff and I think having the KnowBefore training is helpful.”</p>
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Summary of results:

The current state and future of the service

Our clients have confidence in our cybersecurity service and trust that we're implementing the right solutions to protect their businesses. Survey results reveal that clients, middle management, and executive management as a whole have a desire to better understand their security service. As such, we see an opportunity to provide more information about the cybersecurity layers we apply to your business, the capabilities of each layer, and which additional layers are available.

Education is also needed on the urgency of cybersecurity. The truth is, many businesses don't take appropriate cybersecurity action until after an incident occurs.

How Leverage clients react after a security breach

Whether to do with health, relationships, or business, likely everyone reading this report has ignored a problem till it's become a major issue. People like to think problems will resolve themselves or "the worst won't happen to me." It's human nature. We all do it.

At Leverage, we've consistently seen clients decline to add extra security layers until a compromise or security incident occurs. Once they're compromised, then the client takes action. Had the security layers been evaluated upon implementation, the security incident could have been avoided. As mentioned, this is where education comes in. If we can educate our clients now and implement the appropriate security measures, most cybersecurity incidents will be mitigated.

Think of cybersecurity like insurance. You wouldn't live in America without health and car insurance. Cybersecurity is the same way. The right prevention methods mitigate risks and safeguard you from the unexpected.

As evidenced by the 700,000+ SMB cyberattacks in 2020 (mentioned earlier)[2], it's not a matter of if an attack will occur, but when. The question is, will you be prepared?

ROI from cybersecurity service

As cybersecurity is preventative in nature, most business leaders don't think it reaps an ROI. But when you remember that an attack is bound to happen without protection, ROI becomes apparent.

For example, the **average data breach costs SMBs \$108,000** [3]. If you assume that a major incident could occur once every four years (which isn't unlikely considering that **61% of SMBs were targeted by cyberattacks in 2021**)[4], then investing \$10,000 a year in mitigation reaps a \$68,000 ROI within four years. That's a major savings for any SMB, as it amounts to a full year's salary for one or possibly two employees.

SERVICE 4

Business technology infrastructure

The invisible engine that powers your business

Internet outages. Slow computers. Crashed applications. Whether you're an employee or business owner, you've likely experienced the pain of these IT failures. They can ruin your morning, causing frustration and a piled up workload, forcing you to stay late at the office or work the weekend. Why do these problems happen? Technology infrastructure is often at the heart of these issues

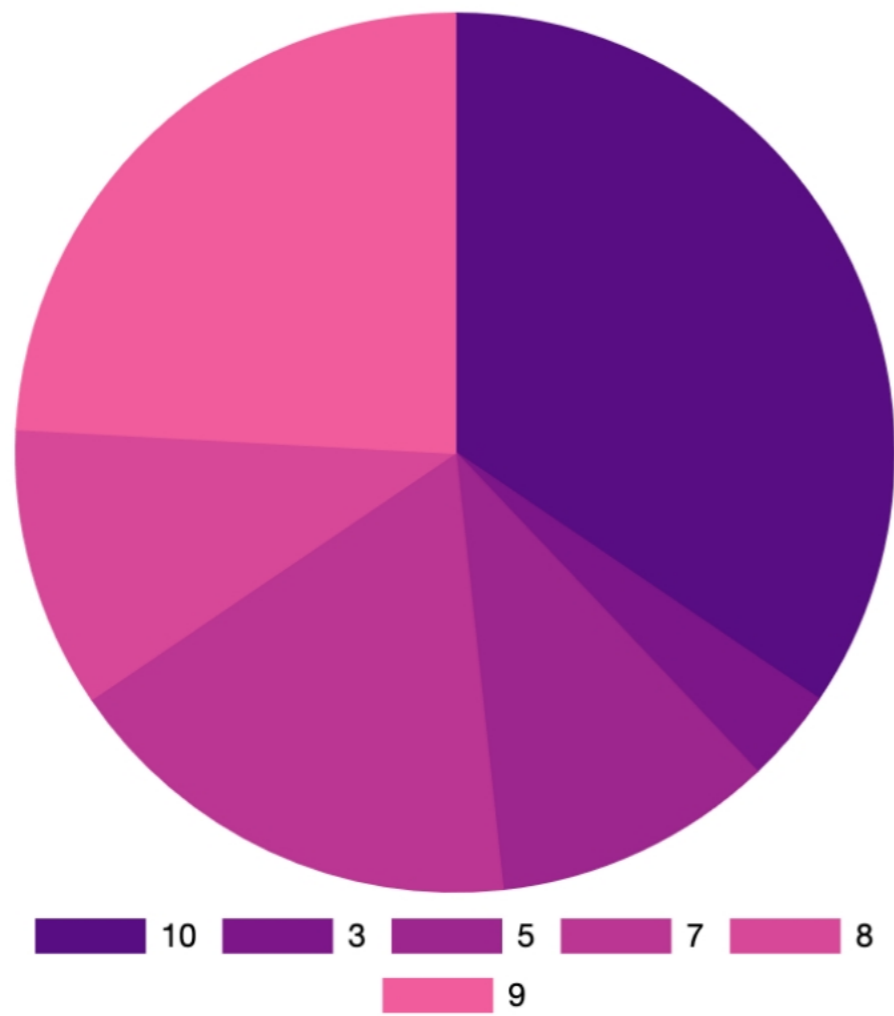
What is business technology infrastructure?

It's easy to ignore IT infrastructure until one of the aforementioned problems bubbles up. That's because your technology infrastructure isn't noticed by most employees. It's the invisible engine that powers your business, consisting of all of the software, hardware, and network resources that support your applications and organize your data.

Technology infrastructure is important because it supports the applications and tools your staff needs to be productive. A disjointed IT infrastructure can cause downtime, which will ultimately hurt your bottom line. When your IT infrastructure runs smoothly, you'll see gains in productivity, efficiency, and staff morale. Everything in your business will flow.

Survey results

We asked our clients: "How confident are you that your business technology infrastructure (Wi-Fi, workstation, laptop, etc.) is supporting your work needs?"



Service Confidence Score Scale:

Clients were asked to rate their confidence on a scale of 0-10. Below are the ranges and what they indicate:

- 0-5 = Low confidence
- 6-7 = Medium confidence
- 8-10 = High confidence

Label	%
10	34
9	24
7	17
8	10
5	10
3	3

Confidence in Leverage IT's business technology infrastructure services:

- ✓ 68% of clients indicate a high level of confidence
- ✓ 85% indicate a medium-high level of confidence

We asked our clients to leave additional feedback about their business technology infrastructure.

Here are some of their comments:

<p>“</p> <p><i>I try to make any infrastructure we have work as best as I can for my needs.</i></p>	<p>“</p> <p><i>I know that my server is on its last legs and I will be moving to the cloud.</i></p>
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Summary of results:

The current state and future of the service

The survey results show that clients are overall confident in Leverage's technology infrastructure services. We see an opportunity to help clients be proactive in the management of their infrastructure, as issues with Wi-Fi, desktop configurations, and outdated hardware sometimes bubble up. Our clients' comments also mention transitioning to cloud computing.

Proactive management and the future of technology infrastructure

Many IT infrastructure problems can be avoided with planning. It's important to look at your organization as a whole and align your business tools and applications with your infrastructure needs. Do your Wi-Fi circuits and network connectivity support your business tools? Is your IT infrastructure overly complex and overloaded with new, incompatible technologies? Does your technology receive regular maintenance? Proactive management of your IT can produce a lean, efficient infrastructure and resolve many technology issues that cause downtime.

Some of our clients are starting to experience the value of cloud services, which is where IT infrastructure is heading. These clients are no longer dependent on or burdened by maintaining their own on-premises infrastructures (e.g., file servers and domain controllers). Instead, the cloud offers a more reliable, secure infrastructure that's available anywhere in the world at any time. If you've yet to adopt cloud computing, we can guide you through the process, making your transition as seamless as possible.

SERVICE 5

Backup and data protection



Safeguard your business's most vital asset

Data is the lifeblood of your business. It's the intellectual property that defines your organization, makes you unique, and helps you stay ahead of competitors. If data is lost, the repercussions can be widespread and lasting. Reputational damage, lawsuits, broken business relationships, and downtime can all have devastating effects.

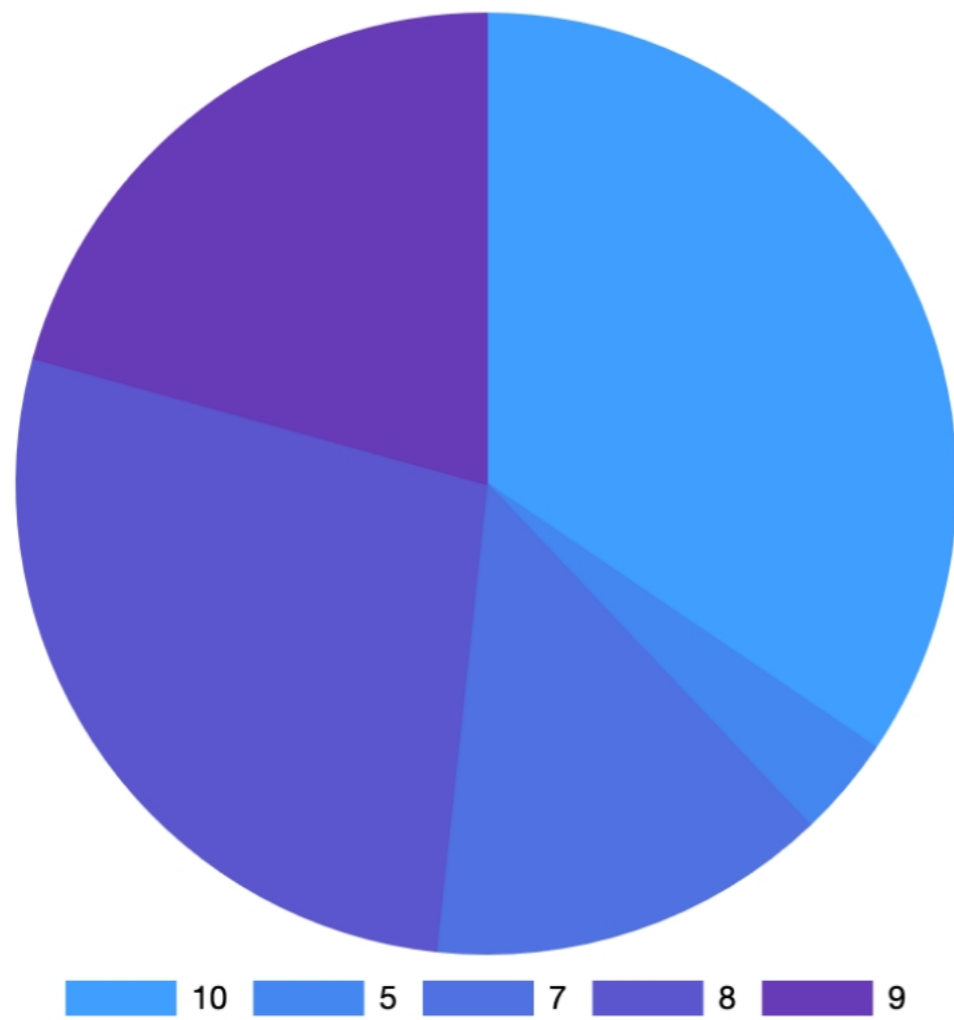
Every business's worst fear

It's your worst nightmare: you're hit with a ransomware attack that encrypts your most critical files, gridlocking your business from moving forward. A chain reaction is set in motion. One by one, you hear employees complain about being locked out of the systems they rely on. Downtime has spread throughout your business like a rapid infection that derails your office's productivity. You must move fast. Thankfully, you have a business continuity plan and have performed regular backups. Your business is up and running again within the hour.

While the story above is about a cyber incident, the truth is data loss can occur in many ways, whether through human error, a disaster, or system corruption. How can you protect your company? It all starts with a business continuity and disaster recovery plan. It's the business equivalent of a fire drill. You create a plan of action to follow so your employees know exactly what to do when disaster strikes. That way, you can get your organization back in operation fast, preventing downtime, financial loss, and stress.

Survey results

We asked our clients: "How confident are you that your business data and work files are adequately protected?"



Service Confidence Score Scale:

Clients were asked to rate their confidence on a scale of 0-10. Below are the ranges and what they indicate:

- 0-5 = Low confidence
- 6-7 = Medium confidence
- 8-10 = High confidence

Label	%
10	34
8	27
9	20
7	13
5	3

Confidence in Leverage IT's backup and data protection services:

- ✓ 81% of clients indicate a high level of confidence
- ✓ 94% indicate a medium-high level of confidence

We asked our clients to leave additional feedback about their backup and data protection.

Here are some of their comments:

<p>“ No concerns about our backup and data protection. In fact, I have the highest level of confidence than I have ever had.</p>	<p>“ We need more training on how to securely store and share information.</p>	<p>“ I assume our data is protected but I don't really know whether protection is available.</p>
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Summary of results:

The current state and future of the service

Leverage's backup and data protection services received the highest confidence level out of all services in the survey. The results reveal its importance to our clients. It also shows that clients have an understanding of the systems in place and the value of business continuity and backup. However, we do see an opportunity here to educate clients on the resiliency of our backup environment and processes.

Cloud data must also be protected

While clients understand the importance of protecting on-premises data, safeguarding cloud data is just as essential. As you've probably noticed from this survey and general industry observations, the business world is heading toward cloud computing, as evident by the popularity of tools like Microsoft 365, Google Drive, and cloud data storage. Data in these cloud environments needs to be protected in the same way as if it were stored on premises. Leverage must ensure we're communicating to our clients how to do this and provide service and support for this technology trend.

6

How likely are our clients to recommend us?

Why we use the net promoter score to measure client satisfaction

Now that you understand how our business is performing in the five service areas, let's look at our clients' overall satisfaction level. To get this, we used the net promoter score (NPS). If you've never heard of NPS, it's a metric developed in 2003 by the multibillion-dollar management consultant firm Bain & Company to measure client satisfaction, enthusiasm, and loyalty. The measuring system is generally considered the gold standard of gauging customer satisfaction and is used by millions of companies worldwide to understand how customers perceive their businesses.

Why is NPS important?

A company's NPS is a strong predictor of business growth. Research has shown that organizations with high scores retain more clients, grow faster, and are more successful in their industries. On the opposite end of the spectrum, a low score can signify a business is in decline and needs rapid improvement.

How is NPS calculated?

An NPS measures client satisfaction by asking one simple question: what is the likelihood that you would recommend us to a friend or colleague?

Clients respond with a rating between 0 (not likely) to 10 (very likely). They are then organized into three categories based on their response:

- **Detractors:** (0–6) Unhappy customers who may hinder growth or damage your brand via negative word of mouth
- **Passives:** (7–8) Satisfied customers who are pleased with your service, but lack enthusiasm for it and may be tempted by competitor offerings
- **Promoters:** (9–10) Loyal customers who sing your company's praises and will often refer you to friends and colleagues, fueling growth

Once the clients are organized into the above groups, calculating the final NPS score is simple: subtract the percentage of detractors from the percentage of promoters.

For example, if 30% of clients are detractors, 10% are passives, and 60% are promoters, then your final NPS is $60 - 30 = 30$.

What is a good NPS?

Net promoter scores fall on a scale between -100 to 100. When a company has more promoters than detractors, the score is positive. Vice versa, when detractors outweigh promoters, the score is negative. With that said, any score above 0 would be considered good. But to really understand what an ideal net promoter score is, it's worth seeing how name brand companies and the IT industry rate. Below is a list of popular companies and their NPS:

- | | |
|------------------------|----------------------|
| ➤ LinkedIn: 21 | ➤ Amazon: 61 |
| ➤ Microsoft: 31 | ➤ Apple: 61 |
| ➤ Cisco: 38 | ➤ Netflix: 67 |
| ➤ Google: 58 | ➤ Zoom: 72 |

Knowing that net promoter scores [vary by industry](#) [5] is also important. For example, healthcare companies have an average NPS of 58, while the telecommunications industry is considerably lower with an average rating of 31.

As for the IT services industry (which Leverage IT belongs to) the average NPS is 40.

Chart: 70% of clients are extremely likely to recommend us

We asked our clients: "On a scale from 0 to 10, how likely are you to recommend us to a friend or colleague?"



Net Promoter Score (NPS) Scale:

- 9-10 = Promoters
- 7-8 = Passives
- 0-6 = Detractors

Label	%
10	48
9	22
8	14
7	14

Leverage IT's NPS

After reviewing our customers' ratings, our NPS comes out to 70.37. While we have room for improvement, we're satisfied with our score, especially considering our industry's average (40) and the scores of name brand technology companies, like Cisco (31), Microsoft (31), and Apple (61).

Overall, our services are valuable and appreciated by clients. We believe the reason for this is because of our values. Though we are an IT service company, we consider ourselves a client service organization first – client satisfaction is prioritized above all else. In the future, we'll continue to measure our NPS to benefit our existing clientele and new customers, and continually work toward providing you with an even better service.

We asked our customers to express why they gave us the score which they gave.

— Here are some of their comments:

<p>“ Your company has been amazing so far. I've worked with many internal and external IT departments, and never have I received this level of professionalism and responsiveness. You are far exceeding expectations.</p>	<p>“ You guys are so accessible and always resolve the problem without having to be asked multiple times.</p>	<p>“ Service is outstanding, timely, and efficient.</p>
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We asked our customers to express what they liked or didn't like about our services and any recommendations to improve.

— Here are some of their comments:

<p>“ Team is outstanding at troubleshooting but I'd like to see a more robust procedure on onboarding a new device, [to make] sure all software is installed, all things [are] working smoothly before I hand it to a new staff member.</p>	<p>“ I wish I could see my fax groups on my PC or from remote working from home. I can fax to all people in the address book for fax but cannot fax a group from my PC.</p>
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Takeaways on client satisfaction and feedback

One pattern our survey revealed is that a consistent satisfaction level exists among clients. We don't have one group of clients rating our service as poor and another singing its praises. Overall, our clients are happy. Also, we're pleased to see clients comment that Leverage IT has great communication, as it's a core value of ours and rare in the IT industry. We've made a concerted effort to achieve this positive feedback, following documented processes, best practices, and core values. However, we know we can improve.

We recognize the onboarding of new PCs is a problem and are addressing the issue. We're now creating systems for the PC deployment and prep process, documenting and enhancing it, and ensuring it's effective for all clients while catering to unique customer needs.

Note: Refer to the Key Takeaways to see how we're going to take action on this data and information.

7

Key Takeaways and How We Plan to Improve

Here are our key takeaways from the survey and how we plan to improve our five service areas.



Technology roadmapping and strategy

- We're satisfied with how clients rated the service but understand there's a gap to fill. To address it, we've enhanced our Navigate service to offer more value.

A key addition is adding advanced Navigate Digital Transformation services. These services are consulting projects led by a certified Digital Transformation Advisor and can help determine and drive a client's business technology roadmap. This added support helps clients gain maximum ROI from their IT investment while leveraging technology to achieve business goals.



Business applications

- Our clients need help architecting a plan for their business applications. Many applications appear to be implemented without a clear understanding of the app's ideal purpose. This can lead to disjointed use among staff, causing communication errors throughout the business as employees utilize apps for whatever means they like.

Businesses experience the most productivity gains from apps when they're installed with a clear intent and their use is standardized and reinforced among employees. Leverage can help with this.



Cybersecurity

- While we're happy with our clients' confidence in our cybersecurity solution, we realize we must provide more clarity on what's included in the service. For example, we need to inform clients of the security layers we apply to protect their businesses, recommend additional security options that are available (preventative measures are key), and communicate how cybersecurity produces an ROI.



Business technology infrastructure

- Our clients benefit from our best practice assessment of their technology infrastructures. This evaluation helps clients understand their current opportunities for tool, application, and infrastructure improvements. Alignment with business technology best practices produces a productive workplace because technology runs smoother and the frequency of computer crashes, Wi-Fi issues, and other technology mishaps is reduced.

While assessing clients' IT infrastructures, we need to provide better recommendations to accelerate their digital transformations. Considering cloud options is important. The use of cloud computing is increasing and new tools like virtual desktops – which is a desktop that acts as a physical desktop but is virtual in the cloud – can improve the overall productivity of organizations, especially in today's world where remote work is common.



Backup and data protection

- While our backup and data protection service has the highest confidence level, some clients are unsure of how we protect their data. We can improve by better educating them on the resiliency of our backup environment and processes.

The biggest takeaway is we must communicate the importance of backup and recovery for data stored in cloud environments. For example, data stored in Microsoft 365 is not immune from data loss – it must also be backed up and protected. It's important that our backup and data protection services encompass both cloud and on-premises environments.



8

Conclusion: Service Enhancements Coming in 2023

As you can probably see, clients are overall satisfied with our service, as evidenced by their many positive comments and our net promoter score of 70.37. Below are some of the significant changes we plan to implement in 2023:

- ✔ **Big picture planning:** Clients will get more benefit from our business applications and business technology infrastructure services if we help them architect a plan that addresses their organization's IT needs as a whole. Ask us about this service.
- ✔ **Better client education for services:** Many clients are unaware of the full spectrum of our cybersecurity and technology roadmapping services. We intend to clarify what's included in these services and offer recommendations for how clients can best utilize them. We also plan to provide more client education on our backup and data protection processes.
- ✔ **New and improved services:** Our Technology roadmapping and strategy service has been revamped to include personal technology consulting from a certified Digital Transformation Advisor. Also, our PC deployment and prep process is being systemized to create a smoother, better onboarding process for new computers.

This survey's goal was to provide you with insights into Leverage IT's performance and how we intend to improve your service. We hope you feel we've accomplished that goal. However, as a client service organization, we welcome your feedback on this survey. Let us know if there is anything you'd like to see differently in the 2024 edition.

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Let's Talk

Want to learn more about what's included in your current IT service? Interested in signing up for cybersecurity, technology roadmapping, or one of our other five key services?

To learn how you can leverage IT with our customized service plans, let's talk. Click the link below to book a call with me, or email me directly at eric.baryol@leverageitc.com.

 **BOOK A CALL**



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