

Strategic Business Reviews

Becoming your clients' trusted technology advisor

by: Dale Stein, Technology Assurance Group (TAG)

Your clients are not spending all day thinking about their print and MFP needs. They have to juggle internet service providers, voice providers, MFP leases and cybersecurity patches — all while trying to actually grow their businesses.

They are not just tired from dealing with the circus; they are frustrated with slow response times, multiple points of failure and having to explain the same issues to three different support teams. Deep down, what they really want is one company to manage their IT, MFPs, cybersecurity and communications — one company to hold accountable. And here is the kicker: They are willing to pay for it.

For years, office technology dealers only focused on MFPs and printers. However, today's smartest dealers have evolved into managed technology services providers (MTSPs) — and they are thriving because: (1) there is a recurring revenue stream attached to every technology service offered to the client; and (2) these dealers are actually solving the client's biggest pain point: complexity.

When you step up and take ownership of your client's entire network strategy, something magical happens: You become indispensable. Instead of being just the "copier guy," you are the client's go-to technology partner. That is how you unlock new revenue streams — managed IT services, voice solutions, cybersecurity — you name it.

When you actually fulfill the promise of a fractional chief technology officer (CTO), your clients start to consult with you on how to grow, scale and plan for their futures (which includes budgeting you into their technology growth plans). Your clients do not want another vendor; they want someone to drive their technology strategies while they focus on growth. That is where you come in.

Strategic business reviews (SBRs) are the bridge between MFPs and managed IT. If you are running an imaging company, you have likely seen the writing on the wall — managed IT services is where the growth is. The challenge? Finding a



way to break into that space without losing focus on your core business. That is where SBRs enter the picture. Think of these reviews as the keys to positioning yourself not just as an MFP provider, but as a trusted technology partner.

By offering clients regular, structured reviews of their technology ecosystems, you can start building the relationships and expertise that will allow you to transition

into managed IT services seamlessly. The concept is straightforward, yet transformative: "How can we help you make or keep more of your money through technology?" See how powerful this can be?

SBRs create a natural opportunity to expand the conversation beyond print. Here is how it works:

■ **Service Performance and Risk Assessments** — You already know your clients' printing environments better than anyone. Use this as a starting point to discuss how their broader technology setups could be improved to prevent downtime and inefficiencies.

■ **Technology Alignment** — Many businesses do not realize the hidden costs of outdated tools. By analyzing their infrastructures — whether it is their MFP fleets, VoIP phone systems or even cybersecurity measures — you can identify opportunities to optimize. (Pro tip: Did you know you can scan the dark web for leaked company credentials/passwords and then start your first meeting with a prospective client by saying: "Here are your employees who recently had their security/passwords compromised. I'd recommend you change those passwords immediately. By the way, would you like us to check and see if there are other ways we can use technology to increase your profits or reduce your costs?")

■ **Cost and Budget Analysis** — This is where you start shifting the perception of your role. Instead of just focusing on print costs, dive into your clients' full IT spends. Highlight areas where you can help them consolidate services, eliminate redundancies and save money. Refer out services that you do not yet have the capacity to provide while you gradually grow

your in-house expertise. For instance, you might discover they are still using premise-based phone systems with costly long-distance charges. By introducing a modern VoIP solution, you could save them thousands annually — and position yourself as the expert who made it happen.

The beauty of SBRs is that they naturally lead to more complex conversations about IT. Once you are trusted to analyze your clients' MFPs and IT budgets, it is a short leap to helping them plan for future upgrades and manage their network infrastructures.

At the heart of every SBR is a technology road map tailored to each client's business goals. This road map lays out a clear path for:

- Scaling the client's technology to match its growth
- Reducing risks by aligning with industry standards
- Implementing new solutions that drive profitability

The key here is positioning yourself as a proactive partner. You are not just a vendor; your clients are trusting you to help their businesses succeed. For office technology dealerships, SBRs offer a way to break into managed IT while still leveraging the relationships and expertise they have built in print.

So what is it that makes this approach so powerful?

■ **Foot in the Door** — Most businesses are eager for advice on cutting technology costs or improving efficiency. SBRs give you a non-threatening way to start those conversations.

■ **Upsell Opportunities** — Once you have identified pain points, it is easy to introduce managed IT services as a solution.

■ **Recurring Revenue** — As you expand into managed IT, you will build a steady stream of recurring revenue that complements your print contracts.

The shift from MFPs to managed IT does not have to be

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overwhelming. SBRs are a simple, effective tool for bridging the gap. You do not have to start big. Just set a few meetings with existing clients and test to see if there is demand. By helping your clients make smarter decisions about their technology investments, you will not only earn their trust, but also position your company for long-term growth in a rapidly evolving market. This is your chance to lead the conversation and be-

come a true technology partner.

Are you ready to take the first step toward diversified long-term recurring revenue streams, higher margins and stronger client relationships? Your clients do not want another vendor; they want peace of mind. By taking full responsibility for their technology and providing a clear, strategic road map, you will build trust, drive profitability and become their most valuable partner. And the best part? While your competitors are still chasing cold leads and one-off sales, you will be locking in relationships that last a lifetime. ■

Editor's Note: On Feb. 6, BTA is hosting a Building My Business webinar: "Five Managed IT Services Differentiators to Dominate Your Competition," to be presented by Dale Stein and Andrew Wolff, vice president of Accelerated Business Solutions, based in Pompano Beach, Florida. To register or view the recording of the webinar after it takes place, visit www.bta.org/BMB.

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