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Leveraging Your Service Desk to Scale Your MSP Business

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Executive Summary

A strong service desk can bring value to internal operations, and it can deliver differentiation in the market place. Therefore, it's not overstating matters to say the service desk plays a very pivotal role in the MSP's business performance and prospects.

For the managed services provider (MSP), service desk capabilities play a critical role in the level of service that customers receive and in the degree to which those services are delivered efficiently and profitably. In short, the service desk can make the difference between a service provider's success or failure. This paper offers some key principles MSPs should adopt in order to help ensure their service desk fully supports operational efficiency, optimal service levels and business growth.

Introduction

When it comes to profitably scaling a service provider business, there are two key requirements: to deliver effective customer service that leads to more—and happier—customers, and to establish the operational processes that enable this level of service, while boosting the efficiency and productivity of staff.

The service desk, more than just about any other platform or service, has a direct and fundamental role to play in both of these areas. A strong service desk can bring value to internal operations, and it can deliver differentiation in the market place. Therefore, it's not overstating matters to say the service desk plays a very pivotal role in the MSP's business performance and prospects.

Today, there are several approaches that you can take that will help your service desk support the growth of your MSP business. This paper looks at four key areas MSPs can target in order to develop the service desk capabilities that foster efficiency and growth.

Delivering Self-Service Capabilities

Providing customers with direct access to information and processes in the service desk is one of the most beneficial things a service provider can do. This effort can both cut costs and improve customer service levels and satisfaction. That's why instituting these capabilities should be job number one for any MSP that doesn't already deliver them.

However, to date, a significant percentage of MSPs have not extended self-service to customers, even though a lot of service desk solutions deployed today support it. Why? For the following reasons:

- **Mindset.** In many service provider businesses, the service desk has been viewed solely as an internal tool, a mechanism that helps internal IT staff to do their jobs. This mindset has shaped tool purchase decisions and limited the effort service providers have put into the service desk—and as a result, their current capabilities are bound to work against them.
- **Limited knowledge base.** One of the key requirements of an effective self-service service desk is the knowledge base. If service providers don't have a robust, current knowledge base to leverage, the work involved in delivering self-service gets tougher.

For service providers looking to roll out self-service capabilities, it is important to bear in mind that when doing so, they are exposing communications and processes that had previously been solely internal.

- **Tool limitations.** Even though many tools may ostensibly offer self-service capabilities, the reality is that many are too cumbersome or limited to use effectively. In many cases, tools weren't initially designed with self-service in mind, so these capabilities are limited or difficult to use. For example, many service desk platforms don't offer a robust Web client interface.

For those organizations looking to deliver self-service capabilities, here are two examples that illustrate the types of services that can be offered and how delivering these services can help:

- **Self help.** Service desks can be the tool customers use to solve issues themselves. For example, if a business user encounters a problem with a printer, they can go to a self-service portal, get quick access to relevant guidance in a knowledge base that provides results from all relevant internal and external sources and take steps needed to solve the problem from their device of choice, including mobile devices. This type of service has two significant benefits. First, customers will be delighted. In many cases, their business users can resolve an issue far faster in this manner than if they had to submit a ticket and wait for resolution. Thus, the business users are more productive and happier, resulting in the customer being more satisfied with the service provider overall. Second, this self-resolution of issues can directly and significantly reduce a service provider's costs, which can feed directly into profits or more competitive pricing.
- **Ticket submission and tracking.** Service providers can equip users with a self-service portal through which they can sign-in and submit tickets themselves. By doing so, organizations can save a lot of money by reducing the number of calls coming into service desk personnel. For example, many estimates indicate organizations spend US\$12 to US\$20 per tier-one service desk call. If a service provider has 1,000 calls coming into the service desk call center each month and can realize even a 10 percent reduction: that reduction can yield savings of up to US\$2,000 a month. In addition, when MSPs enable customers to check status online, users can see on a real-time basis what the status of their issue is, and what steps have been taken—whenever they want. Consequently, service organizations provide greater transparency, so users enjoy better visibility and grow more comfortable and satisfied with their service provider.

In both of the scenarios above, service providers enjoy reduced call volume, lowered costs and increased margins. For many, the concept of self service—and automation more generally—can largely imply such scenarios as the first outlined above. However, it is the latter approach—including ticket submission and status reports that can yield the biggest dividends.

For service providers looking to roll out self-service capabilities, it is important to bear in mind that, when doing so, they are exposing communications and processes that had previously been solely internal. The key thing is to make sure that what customers see is professional, meaningful and useful—from day one. If the responses are not written in a meaningful fashion, the user is going to pick up the phone, which is what the service provider is trying to minimize. Within the service desk, it is important to have a way for agents to have separate locations for internal and customer-facing notes and status updates.

Establishing Shared Services

Fundamental to any MSP's core business model is their ability to offer economics that appeal to a prospective customer. This means offering value-added services more cost effectively than that business could with its own resources. To do so, MSPs need to wring optimal efficiency from their people, operations and infrastructure. Core to this is an ability to build so-called multipliers.

Take pure, one-to-one consulting as a basis for comparison. If a consulting firm hires one person, who effectively has a ceiling of billing 2,000 hours a year and a billing rate of US\$100 an hour, that new hire could generate maximum revenue of US\$200,000 a year—and that assumes that individual could actually keep busy and bill for that entire 2,000 hours available, which isn't realistic in most cases. In contrast, the value proposition of an MSP is the ability to scale revenue per staff member and to support more clients and services with that one person. For example, by adding a new staff member that could support multiple clients and services, an MSP could seek to increase revenue by US\$400,000 a year.

The service desk is at the core of whether MSPs can realize these multipliers and, if so, to what degree they help deliver increased revenues and margins. This is true for any MSP and especially so for those MSPs that provide service desk offerings to clients.

Integral to this is the degree to which the service desk supports shared services and its ability to effectively build one-to-many leverage points. There are four things that MSPs can share and leverage to become more efficient: the service desk application, processes, staff and knowledge. These four areas represent fertile ground for many MSPs today. As they embark on efforts to support shared services across these four areas, they can realize near-term and long-term improvements in both operational efficiencies and service levels. The following sections look at each of the four areas in more detail.

Service desk application

There are four things that MSPs can share and leverage to become more efficient: the service desk application, processes, staff and knowledge. These four areas represent fertile ground for many MSPs today.

To assess the importance of having a consolidated service desk, consider the following hypothetical MSPs:

- **Acme MSP.** Acme MSP takes calls on behalf of its customer base which consists of ten companies, with its agents fielding inquiries and incidents. Each customer has its own unique service desk application that Acme agrees to work with. Thus, if a user from customer A calls in an incident, an Acme MSP agent would need to log a ticket into customer A's service desk and into the MSP's service desk for internal tracking purposes. Further, each agent would need to be trained for multiple customer service desk applications, as well as the MSP's internal system.
- **Beta MSP.** In contrast, Beta MSP uses one service desk system that its ten customers are required to interface with. Consequently, end users and MSP staff both work off a single, unified platform.

These are just a few of the many benefits Beta would have over Acme as a result of its shared service desk:

- **Agent productivity and service levels.** Using one system, agents at Beta are much more efficient and productive than agents at Acme. Ultimately, that makes them more responsive, which translates to improved customer service and satisfaction.
- **New customer ramp.** It's much faster for Beta to ramp up new customers because staff can leverage proven processes, technologies and skill sets in implementation—rather than build these capabilities from scratch for each new engagement.

- **Operational insights.** Agents at Beta get a consolidated view of tickets, agent workload, customer usage and much more, which makes identifying opportunities for improving operations much easier.
- **Data consistency and currency.** Acme may set up some level of integration so that, for example, if an agent updates a ticket in customer A's service desk, that update is automatically propagated to the MSP's service desk. However, even with some rudimentary automation, supporting these myriad service desk applications presents a high cost to Acme. Any time there are multiple systems and repositories, the likelihood is high that redundant effort, inconsistent data and lack of currency in a given repository will be the result.
- **Automation.** Service desk platforms can automate many mundane and common tasks, which is a critical multiplier for MSPs. Having one service desk enables Beta to focus all its process and tool development work on automating its single service desk so that it can take full advantage of this opportunity. Acme on the other hand would need to invest inordinate resources in developing automation for so many tools.

To realize this unified service desk platform, Beta needs a service desk application that supports multi-tenancy and a self-service portal so that clients and the MSP work from one application. However, to be practical, the application must have the architecture and safeguards needed to ensure that one client can't view or access the data of another client.

Processes

This gives the customer confidence in two key areas. First, the MSP can instill more confidence that the processes will be effective and efficient. Second, the processes may be viewed as being more portable across other ITIL-compliant service providers if the customer ultimately decides to change vendors.

MSPs can leverage well-defined processes across their customer base in order to multiply revenues per staff member. For example, if an MSP with ten clients has identical or very similar processes for handling tickets for each client, agents will be much more productive than if they had to learn and support a unique process for each client.

To realize these efficiencies, MSPs need to get customers to buy in to accommodating the MSP's processes. In this effort, it's critical that the MSP can position these processes as based on industry-accepted best practices and processes. This gives the customer confidence in two key areas. First, the MSP can instill more confidence that the processes will be effective and efficient. Second, the processes may be viewed as being more portable across other ITIL-compliant service providers if the customer ultimately decides to change vendors. Thus, the client will be more inclined to adapt their existing processes to that of the service provider. If the service provider simply refers to their processes as internally developed, this becomes a much harder sell, and the customer is more likely to resist change.

Staff

In some cases, an MSP may want to dedicate a specific agent to a specific customer account so that one person is the point contact for fielding all of that organization's inquiries and requests. For most MSPs and in most cases, however, it's advantageous for the MSP to have an entire team of agents capable of supporting multiple clients. Enabling agents to move from supporting one customer to another provides a significant set of advantages, including more effectively accommodating spikes in demand and for effectively balancing workload across the support team. To achieve this goal, one key requirement is shared knowledge, which is covered in the next section.

Knowledge

Historically, in a small MSP, when a service agent works to solve a customer issue, the knowledge gained through the course of that interaction isn't saved and shared in any systematic way. As a result, other agents can't leverage the knowledge when they encounter a customer with a similar issue. Further, if an agent is engaged with a customer issue that takes days to resolve, is out sick one day and the customer calls to inquire about the status of that issue's resolution, no other agents may be able to provide detailed responses and timely service.

To fully enable knowledge sharing as a revenue multiplier, the service desk needs to support the easy capture of and access to knowledge. This should include process integration in which, for example, an agent would not be able to close a ticket without submitting the appropriate knowledge, including customer environment specifics, solutions and more. In addition, service desks need to support the use of this knowledge; it needs to be easy for agents to find relevant answers for the issues they're working on, when they're working on them, wherever that knowledge resides, whether in internal or external sources. The knowledge also needs to be made available via mobile devices so business users can resolve their issues or get answers whenever, wherever they are needed.

This capture of and access to knowledge is vital and can help in several ways. First, building an effective knowledge base helps MSPs to solve problems faster. It can address the issues outlined earlier; agents don't need to reinvent the wheel each time a new inquiry or issue arises. Second, one agent can more quickly and effectively step in for another agent if that team member is out for any reason.

This knowledge base can also provide other significant benefits. For example, if an agent discovers an issue with a common server platform, they could flag that issue and its relevant solution for inclusion across customer implementations so that other customer issues could be addressed more quickly. In addition, agents can even take proactive measures to mitigate the known issue before it has an impact on other customers. Further, this knowledge can be used to power self-help capabilities so that a customer's engineer could get the answers needed to address the server issue directly.

Building Process Consistency and Configurability

To scale, MSPs need to achieve consistency in service delivery and in operations. Having the right processes in place is essential in this endeavor, and the service desk can play a major role in how successful MSPs are in establishing and adhering to these processes. The service desk needs to provide a consistent foundation, one that enables repeatable, consistent, best practice-based workflows across the client base. In addition, it needs to support the configuration and automation needed to effectively meet the specific requirements of the customer. The following sections outline some of the keys to realizing these vital objectives in the service desk.

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Repeatable Standardization

Standardization

Fundamentally, the MSP has to be more efficient and scalable than the enterprise for its business model to work. A key part of this is that service providers can’t afford to have a different service model for each customer. It is only by standardizing on repeatable processes that MSPs can scale.

Usually what happens at the start of every engagement is that each customer wants to receive unique services, effectively saying, “We have our own process for managing desktops; this is the way we do it.” Early on in the business’ evolution, an MSP’s staff might be tempted to offer “have it your way” services, where the service provider works with whatever processes the client wants to follow or has in place.

However, if you go to the customer and say, “We do whatever you want us to do, however you want us to do it,” your MSP business is doomed. Often, very early in their evolution, MSPs realize this one-off approach doesn’t scale. Growing MSPs need to move to more of a manufacturing style approach to service delivery and support, leveraging such “reusable parts” as a formally defined service catalog, repeatable, well-defined processes and more. When service providers establish best practice-based processes—rather than building services from the ground up for each customer—they gain a range of significant advantages.

The reality is that a desktop is a desktop, and a server is a server. Once you’ve leveraged best practices for desktop support, you and every customer that needs desktop support can benefit from adopting those processes. This has to start at the very beginning of the engagement. Once customers understand the MSP’s processes and the benefits of applying best practices, they’ll understand, buy into the MSP’s approach and be willing to move away from the processes they’d been following.

Beyond Trouble Ticketing: The Strategic Nature of the Service Desk

Another part of the MSP’s evolution is that they often start with looking at trouble ticketing or incident management as a point approach, rather than looking at the breadth of capabilities a true service desk can perform. To build efficiency, gain more proactive insights and so on, business management needs to begin leveraging service desk capabilities more broadly. This includes not only managing incidents but building a knowledge base, automating routine tasks, and so on.

ITIL

As discussed above, when working with clients, MSPs need to strive to impose their own processes on the client up front, rather than the other way around. But these processes have to be based on best practices. When you follow best practices, that means your IT management is mature, stable, predictable and consistent and that you’re building operational efficiency into the system on a continuous basis. That’s what everybody is striving for.

ITIL is a set of concepts and practices for managing information technology. For many service providers, ITIL is an invaluable building block. Early on, ITIL can help a service provider define such facets as operational support and what it actually means to clients. Over time, organizations can continue to mature their ITIL approaches so that both customers and the business can see—and benefit from—the maturity of the processes and tools in place.

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ITIL is an accepted standard for support and management of IT and is a critical foundation for developing standardized services and processes that can be leveraged across customers. By using ITIL, MSPs can be consistent across multiple clients, which is key to building an operationally efficient business model. In the end, it's all about scalability.

It is important to note that the employment of ITIL doesn't need to come at the expense of flexibility or customized services. Effective ITIL-based services and platforms still allow for the configuration and rollout of different rules for different customers, such as unique response times, tailored escalation paths and so on.

ITIL-Powered Service Desks: A Practical Approach to ITIL

Adopting ITIL standards goes a long way towards building long-term scalability. However, in spite of the clear advantages ITIL promises, most MSP executives are not going to roll out of bed one day and decide to implement ITIL. Typically, the prospect is just too daunting—current, day-to-day responsibilities simply don't allow for the time it takes to get educated on ITIL and then take the time and effort to adopt it within the organization.

The reality is that MSPs looking to leverage ITIL today have a choice:

- They can look to train and implement ITIL on their own and build their own processes and workflows. This can require taking a more general-purpose service desk solution and customizing it to support best practices.
- They can adopt service desk platforms that are built upon ITIL processes and best practices.

Service desk solutions are available today that come with ITIL processes built in, enabling MSPs to get a head start on improving operational efficiency. These ITIL-based solutions mean that, even for a smaller MSP with limited resources, it is possible to take a practical approach to getting started with ITIL without having to make too large of an up-front investment.

By leveraging platforms that are built on a combination of ITIL and years of MSP expertise, MSPs can get started, and start realizing the benefits of ITIL much more quickly. Thus, MSP management can take advantage of ITIL without having to dedicate the time and cost associated with developing and delivering ITIL-based processes internally.

Configurable Escalation Workflows and Process Automation

For service providers, two of the most important objectives are to instill predictability and consistency across all staff members and processes. MSPs need to configure workflow processes so that they support these objectives. Action-based workflows need to be preconfigured within the service desk so that when a service desk analyst takes a call, they won't have any doubt about what the next step is going to be.

The service desk should be configured so that for each situation that is handled there is a defined action, and that action is taken with 100 percent accuracy, every time. Based on where analysts are within the process, they should solve an issue in the same way, because the service desk supports and enforces that behavior.

Integrating the Run Book With the Service Desk

The more the service desk supports consistency, the easier it is for the organization. Establishing this consistency is like putting a train on rails, making it easy for agents to always follow the same route.

However, for a given service provider, the nature and structure of the services delivered can vary substantially from customer to customer. For one customer, an MSP can manage a client's Exchange servers for U.S. customers during non-business hours. For example, all calls coming in after 5:00 p.m. are automatically assigned to the MSP, rather than the customer's service desk. For another customer, the offering could be 24x7 support for a customer's entire infrastructure, with all tickets going directly to the MSP.

Traditionally, service providers developed what is known as a "run book" for each customer, a printed or online document that defines client-specific procedures. At a high level, there are two key facets to the run book:

- **Technical.** This includes specific instructions, including how an engineer is supposed to reboot a machine, create new users, or apply a patch. These are tasks that are often associated with what is known as run book automation.
- **Process.** This includes SLAs and escalation procedures.

To scale, MSPs need to integrate their run book processes into their service desk so that processes are seamlessly integrated with service desk interactions and automated wherever possible.

Configurability and Automation

While common processes need to form the backbone of the service desk, MSPs need to be able to tailor such activities as escalation processes to the specifics of the client. What does the agent do when a customer calls? Who do calls get routed to? What are the SLAs associated with that specific issue or inquiry? All these considerations need to be configurable within the service desk.

Configurable escalation processes can be automated by translating them into the service desk system. This includes such tasks as rerouting tickets based on predefined intervals and service levels. For example, if an outage happens that affects a strategic individual or process, that issue may be tagged in such a way that, if a response hasn't occurred within two hours of submission, the issue gets escalated to another team or set of individuals. These escalation processes can be defined according to SLAs so that, for example if the SLA states that every level one ticket must be followed up on within one hour, a trigger can be defined that escalates the ticket if no one has responded within 45 minutes of the call so that another individual can take action in time to ensure compliance.

Not all MSPs have sophisticated, automated escalation processes in place, but they should. These often can be simple things to achieve, and they're critical in supporting an MSP's growth.

Leveraging Analytics

The service desk is a focal point for much of a service provider's operations. As a result, harnessing the information that gets collected in this platform can be a highly effective way to realize a host of improvements. The service desk can equip staff members and management with measures of an array of areas, helping identify operational bottlenecks, infrastructure issues and other areas for improvement.

Analytics data can be leveraged internally to help optimize operations within the MSP, or it can be shared with clients to help them realize service and infrastructure improvements. Fundamentally, these analytics can provide a means for an MSP to take its business to the next level. Following are a few key areas in which analytics can fuel improvements.

Optimizing Client Environments

For both the MSP and the customer, a key objective is always to reduce the amount and duration of system issues. The more stable systems are, the better the MSP's margins will be and the happier the customer will be. To this end, it's vital to have effective measures of infrastructure issues. For example, in one client organization, a business application's storage unit was frequently encountering issues which were creating a host of time-consuming troubleshooting and remediation efforts for the MSP's staff. The MSP leveraged the service desk to gather data that tracked the performance of the storage unit. They then presented this information to the customer with the recommendation that the storage unit be replaced. For both the client and the MSP, this replacement was of strategic importance. For the client, replacing the faulty unit would lead directly to improved staff productivity. For the MSP, eliminating the staff time and cost associated with that one unit would significantly improve profits.

Often, business decision makers aren't aware of these problems. Having the capabilities needed to access and intelligently review this data makes it possible to identify—and address—these conditions. In just about any business, a wealth of important data resides in the service desk. The key issue is whether and how this information gets used.

Boosting Client Efficiency

Just about any action that takes place within an MSP is a data point. MSPs need to institute the systems and technologies needed to ensure these data points are consistently captured. For example, an MSP was tracking the service desk calls for a global retailer. Through their review of analytics, managers saw that a lot of inquiries surrounding a specific type of server were coming in from Japan, far more than any other region. After raising this issue with the business's management, the service provider learned that important server training hadn't been delivered to staff in Japan. Having this data made it clear to the client's business management that there was an issue and how it could be addressed.

Enhancing MSP Operations

An effective service desk platform can help MSP management more knowledgeably and effectively track, assess and improve their organization's operational performance. This can include the following activities:

- Tracking individual and team performance
- Measuring staff productivity
- Identifying areas for improvement
- Measuring workloads in order to better manage staffing levels and hiring
- Establishing effective baselines of ongoing tasks in order to identify areas for improvement and track progress
- Measuring which customers and services are the least profitable and which are the most profitable
- Using dashboards for running the business on a daily basis
- Refining guidelines for handling requests, defining issue severities and more

CA Cloud Service Management: Delivering the Capabilities That Fuel MSP Growth

CA Cloud Service Management is a breakthrough in service management, a powerful solution that is built for speed—rapidly accelerating time-to-value for MSPs and their customers where other SaaS solutions fall short. Implement customers in days, have them adopt with minimal training, configure without programmers, automate end-user requests and get automatic upgrades.

CA Cloud Service Management offers broad, integrated IT service management capabilities—including service catalog, incident management, change management, asset management and discovery and more. Designed by seasoned MSP practitioners, CA Cloud Service Management delivers an unparalleled blend of capabilities:

- **Efficient multi-tenant support.** Effectively partition and tailor services to each client, while retaining the integrated multi-client management views needed to strengthen operations.
- **True business-boosting ITIL alignment.** Leverage automated workflows for each of the key areas within ITIL, and gain the actionable insights needed to truly optimize business performance.
- **Simple deployment and licensing.** CA Cloud Service Management is a subscription-based solution that deploys easily and enables you to ramp up new services quickly, while minimizing up-front expense.

CA Cloud Service Management delivers the sophisticated yet easy-to-use capabilities your MSP business needs to realize a host of business objectives:

- **Enhance business agility.** CA Cloud Service Management is available as a SaaS-based offering. The SaaS solution means no hardware to configure and no software to install—and that additional capacity can be added any time it's needed. Further, CA Cloud Service Management offers automated workflows that are ready to use immediately. As a result, you can deploy new services, provision new customers and enhance your offerings more quickly than ever before.
- **Improve internal operations.** CA Cloud Service Management gives you the tools you need to better measure, track and improve business performance. CA Cloud Service Management supports the best practices proven to boost operational efficiency and quality, and it offers the sophisticated automation and integration capabilities that eliminate manual, error-prone efforts. Plus, CA Cloud Service Management features knowledge base support, automation, self-service, mobility and workflows that promote ongoing team learning and efficiency and reduce redundant service requests.
- **Enhance service levels.** With CA Cloud Service Management, your organization can realize the efficiency gains and operational insights it needs to deliver more effective, responsive and reliable services to customers. CA Cloud Service Management is built on a multi-tenant architecture that makes it efficient to deliver more personalized services to multiple clients—including customizing portal views and branding, communication templates and routing rules. With CA Cloud Service Management, you can more consistently meet your service level agreements and objectives—and deliver the high value services that strengthen customer satisfaction and loyalty.
- **Expand service desk offerings—and business.** With CA Cloud Service Management, you can realize the operational efficiencies that enable you to support more clients. In addition, with the comprehensive capabilities and flexibility CA Cloud Service Management delivers, you can easily expand your service management offerings.
- **Boost margins.** By leveraging the subscription-based pricing of CA Cloud Service Management, your organization can minimize total cost of ownership and more easily align ongoing costs with revenues. Further, by employing a single solution with all the requisite service desk capabilities, you can reduce the costs associated with managing multiple point solutions and maintaining custom tools and scripts.

Conclusion

While early stage MSPs often can get by with a host of manual procedures, informal ad hoc processes and limited automation of ongoing tasks, these factors will prove to present increasingly significant obstacles as an organization seeks to grow. Given the central role it plays in service delivery and operations, the service desk represents an essential platform that can deliver the operational efficiencies that fuel profitability and growth. With its unrivaled combination of capabilities, CA Cloud Service Management is a platform that is uniquely suited to helping MSPs scale their business—while maximizing profits.

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