



**Third  
Coast**



*GETTING THE MOST OUT OF YOUR TECHNOLOGY –  
Your Essential Guide to getting amazing service &  
support from Third Coast IT*

**THIRD COAST IT  
10440 W PALLOTTINE DRIVE  
GREENFIELD, WI 53228  
(414) 622-1000  
SUPPORT@THIRD Coast IT.COM  
WWW.THIRD Coast IT.COM**

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## A QUICK NOTE FROM THIRD COAST IT

Hello there!

My team and I are excited to be working with you, whether you are a new customer or existing customer we are happy you are reading this guide.

As you'll come to learn, here at Third Coast IT we **LOVE** Technology!

(yup, we're geeks).

And, we **LOVE** helping people!

(watch for the smile on our face when we help you solve a technical challenge).

So, our mission is simple...

***To help you and your team be highly profitable, wildly innovative & exceedingly efficient by implementing and learning how to use the latest and greatest Technology to help power your business!***

You might think it's weird, but we honestly wake up every day excited to help businesses like yours better use all the amazing Technology that exists out there!

As part of that, this short guide will arm you with all the information you need to get the most out of working with us.

I encourage you to take 5-10 minutes to read through it now so that when you do need our help – you'll know how to best get it!

All the best and be in touch!



Cheers,

Ryan Carpenter

# HOW CAN I GET FAST SUPPORT?

The first question you might have when working with us is... **How do I Get Fast Support**, so here's our recommended ways.

	<h3>USING THE THIRD COAST IT APP</h3> <p>This is the easiest and fastest way to get Help</p> <p>Simply right-click on our support icon next to your Clock - it looks like this:  and a window will pop-up with an option to 'Request Support', guiding you easily through the process!</p>
	<h3>BY SENDING US AN EMAIL</h3> <p>If you prefer email, simply shoot us an email to <a href="mailto:support@thirdcoastit.com">support@thirdcoastit.com</a></p> <p>This will automatically pop-up in our system and we'll work on to it as soon as possible. You'll get an automated reply confirming we've got it!</p>
	<h3>BY CALLING US</h3> <p>You can call us at 414-622-1000 whenever you need help.</p> <p>If you need help <b>URGENTLY</b>, make sure you call us rather than use any of the other methods.</p>

## IMPORTANT NOTE



If you send emails to our **Direct Email Addresses** or call us on our **Cell Phones**, this will likely slow our response times down because we've built our processes to be quickest & most reliable when you use the methods above.

## HOW FAST WILL YOU RESPOND?

Our front line team are continually monitoring our Support Request System and are standing by on the phones waiting for your call during regular business hours.

The first person you speak to when you call will likely be from our care coordinator Alyssa. If she does not answer, we have programmed our phones to ring the rest of our staff sequentially before going to voicemail. If you actually get to this point, leaving a voicemail will automatically create a ticket in our support system and we will respond as soon as possible.

If you reach Alyssa, she will triage and work through your query as quick as possible and you'll find that many of your requests may be handled directly by her, or she will transfer you to an engineer who will.

Occasionally we will need to escalate an advanced or particularly challenging issue internally to our Senior Engineers. We'll let you know if that happens.



PRIORITY	EXAMPLES		TARGET RESPONSE TIMES
 <b>Critical</b>	Your Main Server is offline and all users are unable to work.		<b>1 Hours</b>
	One of your Network Switches has failed and stopped half the users from working.		
	A VPN link between 2 x offices is offline causing one office to be unable to work.		
 <b>High</b>	Your Internet Connection is offline, users can still work locally OK		<b>2 Hours</b>
	Your CEO's computer has stopped working and they have an urgent task		
	Your main Accounting Software has stopped working and is unavailable		
 <b>Medium</b>	A user's desktop is making a strange noise		<b>6 Hours</b>
	One of the main printers is not working, but users can print to another one		
	A user is having problems connecting to the Wireless network		
 <b>Low</b>	Printing is slower than normal		<b>8 Hours</b>
	A single user is unable to scan documents		
	A user needs a program installed on their Computer or Laptop		
 <b>No Priority</b>	Pro-Active Maintenance of systems, including Software Updates		<b>N/A</b>
	New User Setup and Configuration		
	New Computer or Laptop Installation and Configuration		

## HOW DO I ESCALATE SOMETHING?

We always aim to exceed your expectations, but we are realistic enough to know that perfection is not possible 100% of the time.

### **We are humans after all**

So, if you ever have a situation where you feel we're not handling your request as well as we could be, you can escalate that issue...

Right up to the "big boss" if you'd like!



Here's the order of escalation contacts and their direct contact details:

<b>ESCALATION CONTACTS</b>	
<b>1. SERVICE CO-ORDINATOR</b>	<b>Phone:</b> 414-622-1000 <b>Email:</b> alyssa@thirdcoastit.com
<b>2. SERVICE MANAGER</b>	<b>Phone:</b> 414-533-5562 <b>Email:</b> joe@thirdcoastit.com
<b>3. CEO / GENERAL MANAGER</b>	<b>Phone:</b> 414-671-9662 <b>Email:</b> ryan@thirdcoastit.com

As you'll come to notice (& love), our team is extremely professional, highly efficient and very capable, so hopefully you'll never need to use this process.

However, you now know that if the rare occasion pop-ups where we do miss your expectations, there's an easy way for you to let us know so we can fix it ASAP!

Should we ever make a mistake, you can rely on us to be upfront and accountable.

## WHAT CAN WE HELP WITH?

We're not just Computer People

We can also help you out with most Technology things related to your business.

Here's a list of some of the services we can assist with:

- ✓ Office 365 / Microsoft 365
- ✓ Microsoft Azure & Cloud Hosting
- ✓ Hardware & Software Procurement
- ✓ Software Licensing
- ✓ Internet & Private Data Connections
- ✓ VoIP / SIP Trunking & Telephone
- ✓ Hosted Phone Systems
- ✓ On-Premise Phone Systems
- ✓ Website Hosting
- ✓ Penetration Testing
- ✓ Project Planning
- ✓ Procurement
- ✓ Cybersecurity
- ✓ IT Budgeting (create yours)
- ✓ IT Consulting
- ✓ IT Strategic Planning
- ✓ Disaster Recovery Planning
- ✓ Business Continuity Planning
- ✓ DNS / Domain Name Hosting
- ✓ Domain Name Renewals
- ✓ Anything technology Related

Plus, we have a network of **Trusted Partners** for services like Accounting, Legal Services, Marketing and much more, so if you're looking for something not on this list – get in touch with us via your **Account Manager** to find out whether we can help you or point you in the right direction!

## BUSINESS IMPROVEMENT PROJECTS

One of our areas of specialty is working out how businesses like yours can better use **Technology** to solve **Business Problems**.

So, whenever you have a challenge in your business that you're struggling to find an answer for – simply pick up the phone and give your **Account Manager / vCIO (Virtual Chief Information Officer)** a call.

There's a **VERY** good chance we'll be able to help you find a creative way to solve your challenge, often using a mixture of **Business Consulting** and **Technology**.

A perfect example of where we can usually find efficiencies and automated ways to do things is wherever you use Microsoft Excel. We can often find ways to automate these tasks and help you build out business dashboards to better manage your numbers.

We honestly **LOVE** solving challenges like this so we can help you be more Profitable, more Innovative and more Efficient by using Technology.



# OUR RECOMMENDED TECHNOLOGY PLATFORM

There's are many different types of Technology out there in the world.

Which makes it *impossible* for anyone to keep up with it all.

So, to make sure we can deliver world-class, fast, amazing service – we constantly work towards helping all of our clients use the Technology we know and love the best (we call this our **Recommended Technology Platform** or **RTP** for short).



We aim for all of our clients to use as much of our **RTP** as possible and we make sure we maintain deep knowledge and training on everything in our **RTP** so we can keep your IT Infrastructure nicely integrated, fast to support and world-class!

Plus, we use these tools on the RTP within our own business!

## THE RECOMMENDED LIST

- ✓ Microsoft 365
- ✓ Microsoft Azure
- ✓ Microsoft Servers
- ✓ Microsoft Hyper-V
- ✓ HP Servers & Storage
- ✓ HP Desktops & Laptops
- ✓ HP Switches
- ✓ HP Printers
- ✓ Ubiquiti Wireless Access Points
- ✓ Business Class Routers & Firewalls
- ✓ Microsoft Office 2019 and Above
- ✓ Microsoft Windows 11 and Above
- ✓ VOIP Phone Systems

## THIRD PARTY VENDORS

Whilst we work hard to stay trained and up to date in all of the above Technology, we know that from time to time, you'll need help with something that's not on the list.

When this happens, just keep in mind that it may take us some extra time to familiarize ourselves with supporting that product.

But take solace that we are still world class at troubleshooting other products, so we'll be able to work it out!

Also, please keep in mind that while we may be able to purchase items from other vendors that we don't list above, any support may end up being Out of Scope for your Fixed Fee Support Agreement and incur some extra costs.

We'll always inform you in advance if this is the case.

# YOUR CONTACTS

## YOUR ACCOUNT MANAGER / VCIO

When your business starts work with us, we assign you an Account Manager / vCIO. Unless noted, this will be Ryan Carpenter, the owner of Third Coast IT.

Your Account Manager / vCIO is who you should call for any questions about your business and all account level discussions

Whenever you need to talk to someone about your future plans, your budgeting, upcoming projects or anything else related to your IT Infrastructure, get in touch with your Account Manager / vCIO.

Your Account Manager / vCIO will also be the person who will be working with you on your Regular Technology Business Reviews (TBRs for short). More about them soon.



There's no need to get in touch with your **Account Manager** for Helpdesk Support or Service Requests as they'll simply tell you to get in touch with the Helpdesk team directly for the fastest help and quickest response!

## YOUR PRIMARY IT CONTACT/S

As part of your Onboarding, we asked you to appoint a primary IT contact from your side (or sometimes a few).

Your primary IT contact/s are the ones authorized to make changes to your Account and are who we send important information to.

If you're not the Primary IT Contact in your business, then it's best to speak to them whenever you have a request that includes adding / editing or deleting users or data as they'll need to authorize it first.

We have this security in place for your protection as we wouldn't want to give a new user access to your confidential data one day that didn't have authority to have access.

## YOUR ACCOUNTS CONTACTS

If you ever need any help with any Accounting Issues (such as needing copies of Invoices etc), simply shoot an email to [support@thirdcoastit.com](mailto:support@thirdcoastit.com) and our friendly Accounts team will help you out.

You can also call our office at 414-622-1000 during business hours Mon – Fri 8-5.

You can also login to your Client Payment Portal at [pay.thirdcoastit.com](http://pay.thirdcoastit.com) to download any invoices you might need or make a payment.



## HOW DO I ORDER HARDWARE OR SOFTWARE?

Whenever you need any new equipment or software, we've got you covered.

We have a dedicated procurement and ordering system in house that is designed to take the hassle and pain out of the process whenever you need to order anything.

### SMALLER ORDERS

If it's for a small order such as a few new computers or laptops – simply give us a call on 414-622-1000 or shoot us an email to support@thirdcoastit.com and we'll send you back a Quote.

We aim to get all quotes back to you within 3 business days 🕒

### LARGER ORDERS

If your order is large or it's for a project (like a migration an office move), then it's best to speak to your account manager so they can make sure that align everything up properly for you.

They'll work to get you an official fixed fee proposal to cover everything you need!

### APPROVING AND PAYING

Unless it's a complex project, we'll typically send you your quotes & proposals using our web based quote delivery system.

You'll simply need to click on the link in the email and you'll be able to view the quote or proposal. You can sign the agreement digitally and we will get to work ordering and scheduling your new equipment.

### WHAT ABOUT OUT OF STOCK ITEMS?

If something is in stock, we'll normally be able to get it in place for you quickly.

If it's out of stock, our procurement team will keep you up to date with estimates on when it's due to arrive.

If our distributors tell us that it's going to be out of stock for a while, we'll work with you to find some alternatives (especially if it's something you need quickly).

### CREDIT ACCOUNTS

Currently, we may be able to offer limited financing options based on the size of the project. We might be able to spread your payment over the course of 3 to 6 months or make other similar arrangements at our discretion.

We know we're not very good at being a bank for beyond the basics, so for larger orders, if you are looking for credit, we're more than happy to work alongside your financial supplier to help you obtain credit on a project.

If you don't have a financial broker, we put you in touch with one that a number of our clients use. Just give your account manager a call and we will make the introduction.

## SOME MORE IMPORTANT BITS

Here's a few more important bits of information to help you better understand and navigate the crazy Technology world and some of the terminology we may use when we're talking to you!

### SECURITY VS USABILITY

In the Technology world, there's an ongoing battle between **Security** vs **Usability**.

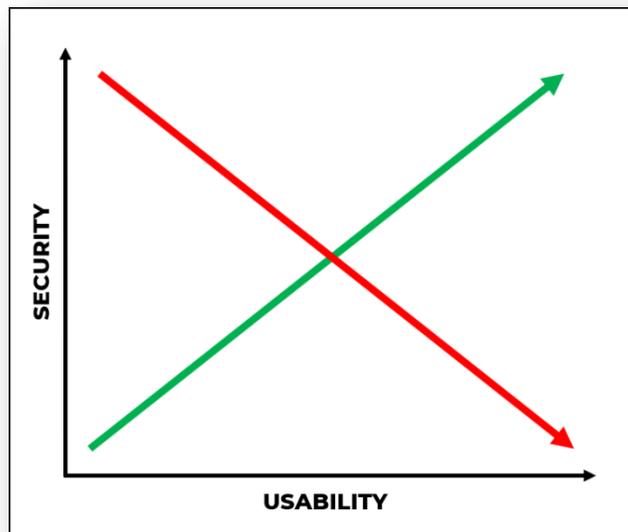
Every day, there are millions of hackers around the world, trying to break into networks like yours.

And, the best way to defend against them is to **NOT** use Technology at all.

But that wouldn't be fun, right?

The problem with Technology though is that typically, the more **Secure** your systems, the harder they become to use!

On a graph, it looks a little like this:



So, please know that we do our very best to make your business as secure as we can with the budgets you give us to work with. And, at the same time we also try to make things as easy to use as possible, while keeping security as high as we can.

You might notice this in things like our strong recommendation that every single user uses **2-Factor Authentication**.

We know it can be painful to use because we protect 100% of our systems with it.

However, turning it on, can help block a lot of the most common hacking attempts that are happening on your network to help keep your data safe.

We err on the side of high security, but we also aim to for easy usability.

## IN SCOPE VS OUT-OF-SCOPE

If you've ever been to an All-You-Can-Eat Buffet, you'll know that you're able to eat as much of anything that's out on the buffet as possible.

However, if you'd like something that's NOT on the menu – then you have to pay for it separately.

Our Fixed Fee IT Agreements and Fixed Fee Projects work in the exact same way.

That means, that you can have as MUCH as you like of anything that we cover in our Scope of Work that we have crafted specifically for your office.

And, when you need something that's not on the list, we will simply quote you a separate Fixed Fee Quote so you can work out whether you want to go ahead with it or not.

We call this whole conversation IN-SCOPE and OUT-OF-SCOPE.

And, whilst we have worked hard to build an offering where pretty much *everything* you will need in the day-to-day operation of your business will be included IN-SCOPE – you might find from time to time that there will be things that are OUT-OF-SCOPE.



If you're unsure if something's included or excluded, simply give us a call so we can talk through it!

Thanks for taking the time to better understand how we serve you.

**If you skipped straight to the end of this document, please know our main points of contact are via phone at 414-622-1000 and email at [support@thirdcoastit.com](mailto:support@thirdcoastit.com)**

We're excited to be working with you and welcome open communication—please don't hesitate to connect with us whenever needed!

**Sincerely,**

**Your friends at Third Coast IT**