

The Evergreen Service Desk

Building an AI Ready Service Delivery Team

ITX LOS ANGELES



RIDGEVIEW ADVISORS





Andrew Moore

President: Ridgeview Advisors

Moore's Law - On Steroids - *For MSPs

AI capability is not evolving —
It's exploding

3–6

Months

AI capability doubles

100%

Growth

The rate at which AI
processing power increases
annually

74%

Adoption

of MSPs say AI will
fundamentally change service
delivery within 2 years

40%

AI First

Tools that are built to handle
AI specific tasks in the MSP
ecosystem



DeskDay & Channelnomics data cited



Democratizing Software & The Death of Platforms

Building Software: Simplified

By 2026, 80% of tech products will be built by **non-IT professionals**, creating agile, outside solutions. (Gartner)

1 Citizen Developers

Business users (**4x pro devs**) create "disposable" AI tools, bypassing traditional software channels.

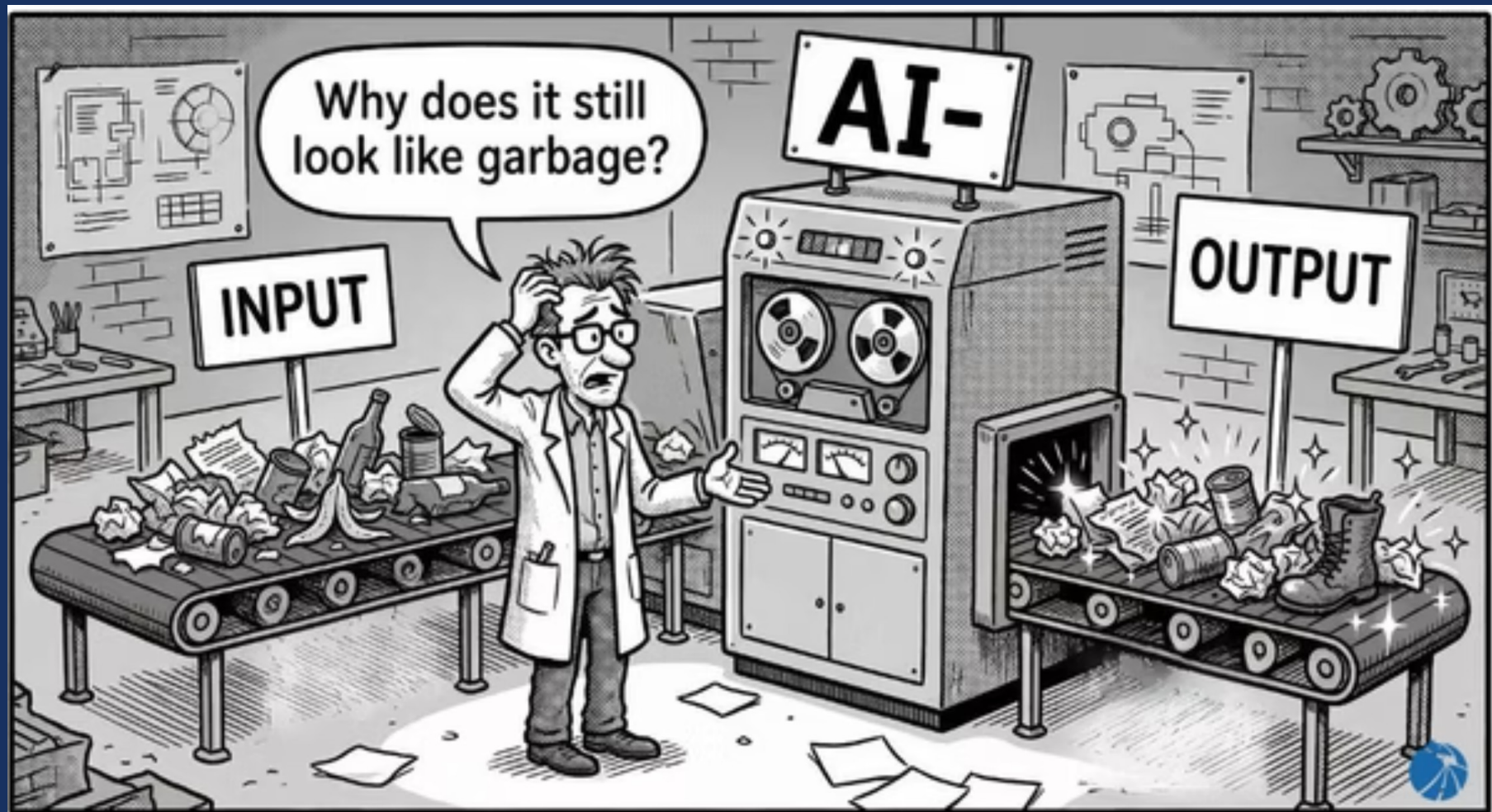
2 Micro-Agent Surge

40% of enterprise apps integrate task-specific AI agents, making monolithic suites feel slow.

Platform SaaS Solutions Struggle

Vendor-locked, monolithic stacks limit growth to one vendor eco-system, while the market moves at an exponential 32x. This prevents MSPs from accessing efficient, low-cost AI tools.

Automation doesn't fix chaos —
It amplifies it.



The Problem

MSPs rushing to bolt AI onto broken processes are accelerating their own dysfunction. Speed without structure is just faster failure.

WE CANNOT HELP OTHERS, IF WE CANNOT HELP OURSELVES



Building the Service Model

To thrive in an AI-driven landscape, we must build an **Agnostic Operational Engine** — a resilient framework designed for continuous adaptation and growth. To do so we must understand 3 core pillars:



Momentum

How work flows through your service desk.



Precision

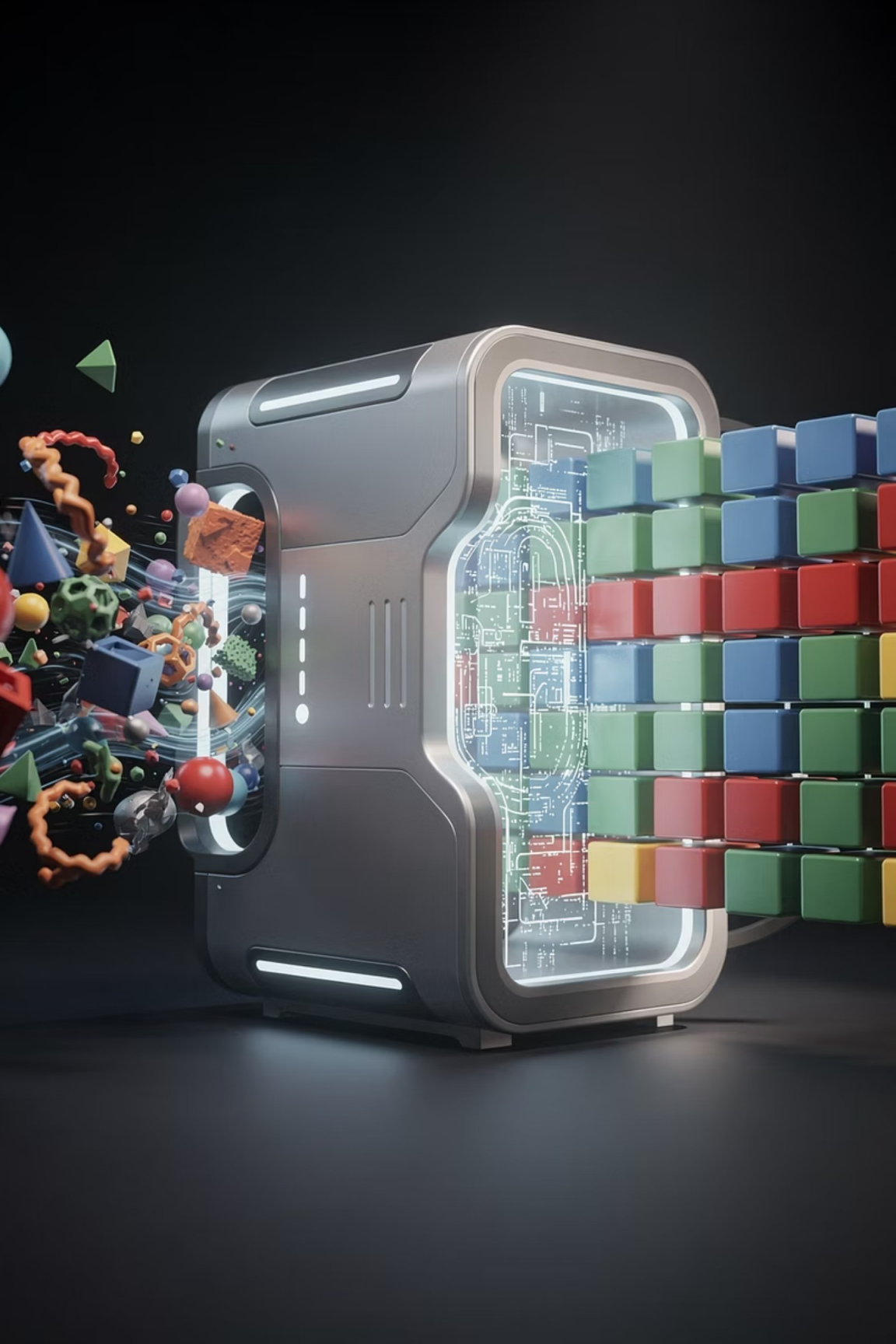
The quality of the work outputs.



Accountability

Clear ownership, transparency, and measurable results.

This foundational approach outlasts any single tool or platform, ensuring our service delivery remains agile and effective, no matter what AI innovation comes next.

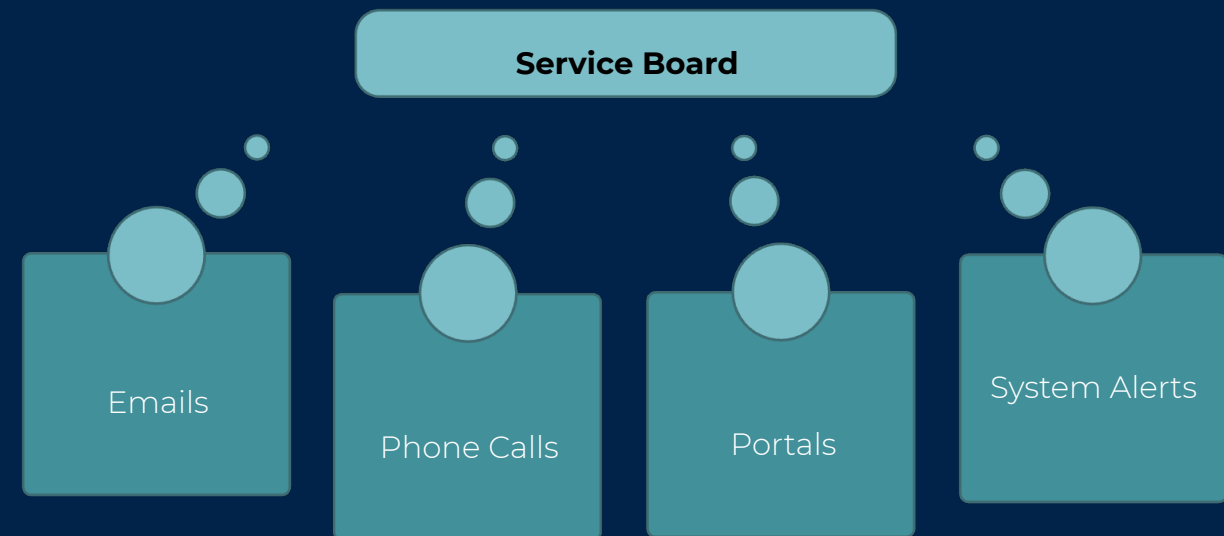


Momentum: Logic of Intake

Your service desk's entry point should function as **a gate, not a net.**

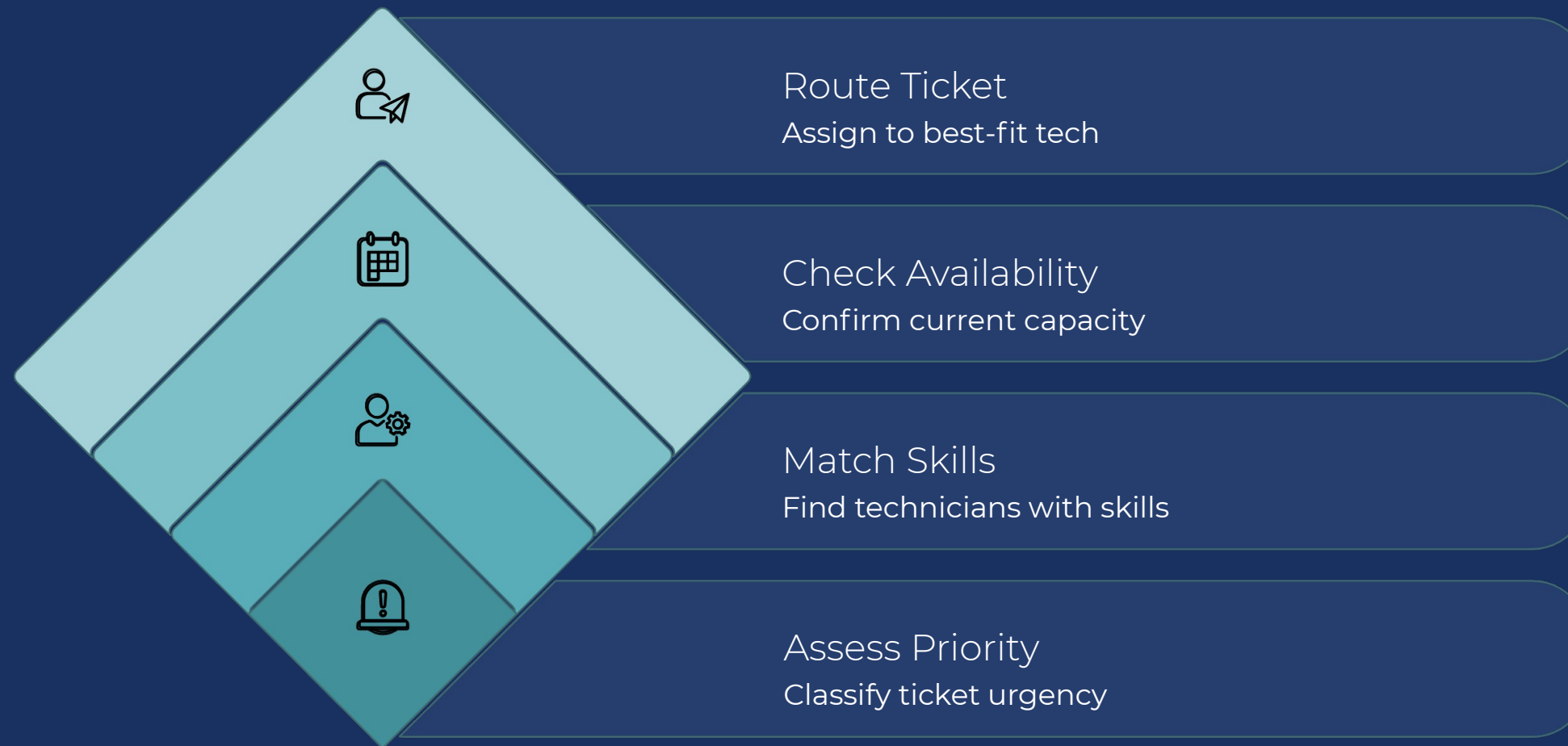


Audit how work initiates: is it through structured data like forms and portals, or through unstructured "noise" such as vague emails?



Momentum: The Execution Path

Efficient service delivery hinges on a clear, automated "Logic Tree" for ticket assignment. Relying on individual technician knowledge creates critical bottlenecks and inconsistent service quality.



Audit your ticket triage, escalation and assignment processes. Determine how works should flow through the systems and how it is manifested.

Momentum: The Exit Strategy

How do we "kill" tickets?

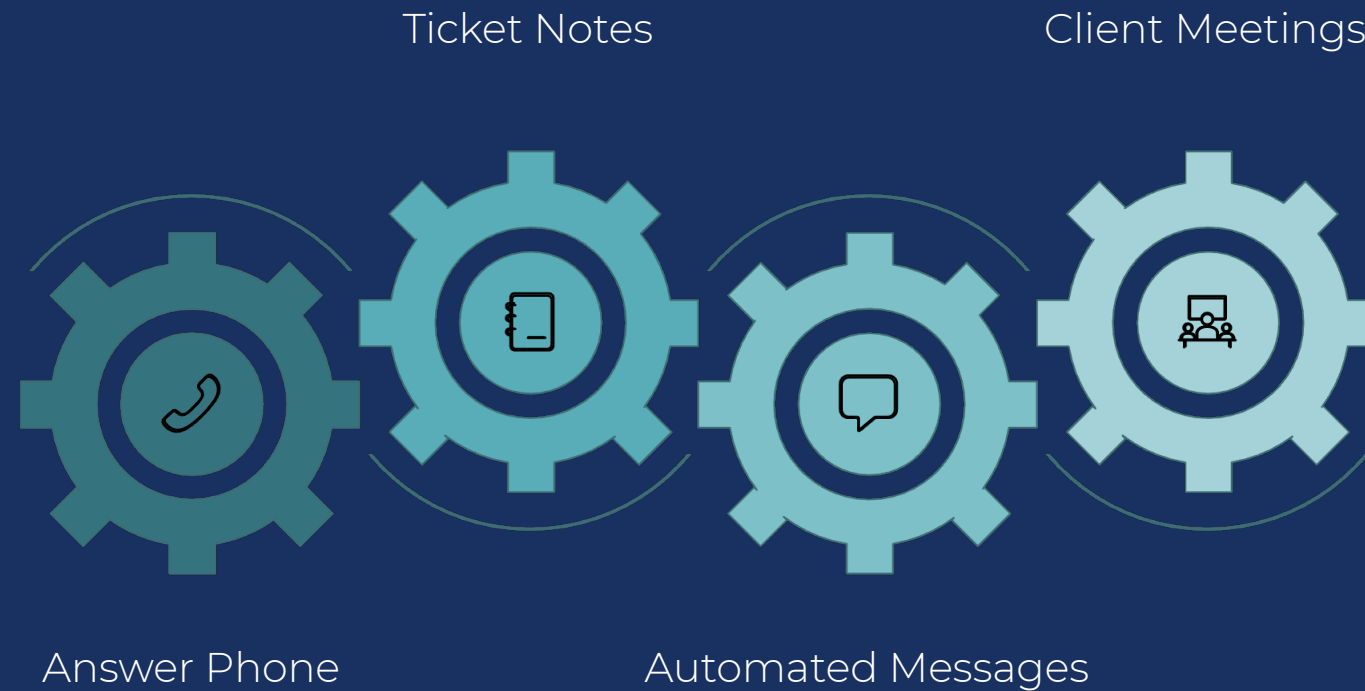
The exit process for every ticket must be understood and outcomes from the ticket closure should be mapped. Are tickets coded properly for the work performed? Did the ticket generate an invoice? Was the work done after hours?

- 📄 Audit ticket close processes, workflows and automation triggered by closed tickets and their status or other factors. Review how invoices are created from tickets. Does a client get a report with notes and time when tickets are closed? Is the ticket closed or just completed?



Precision – Standardizing Client Interaction

Your "Front of House" is the voice of your brand. Understand how your team is communicating in tickets, on the phone and during meetings.



i Audit your current communication channels to ensure a consistent brand voice and professional tone. How do techs answer the phone? How are note and information entered into tickets? What do automated messages to clients say and look like? Do client meetings follow a standard agenda and tone?

Precision – Technical Remediation & Atomic SOPs

Transitioning from verbose, narrative Standard Operating Procedures to **Atomic SOPs** is crucial for AI adoption. Processes must be broken down into binary "If/Then" logic to be actionable by microtools, eliminating ambiguity and ensuring consistent execution.

Narrative SOP (Legacy)

Restarting a Hung Service:

If a client reports that a specific application is not responding or printing isn't working, it's often due to a service on their machine being stuck. You'll need to open the Services console, find the relevant service (like 'Print Spooler' for printing issues), and try to restart it. Keep an eye on the service status; if it doesn't start properly, you might need to investigate further by checking system logs or escalating the issue.

Atomic SOP (AI-Ready)

Service Restart Procedure:

1. **IF** reported issue = "Application Unresponsive" **OR** "Printing Failure"
2. **THEN** identify suspected service (e.g., "Print Spooler").
3. **ACTION:** Open `services.msc`.
4. **LOCATE:** Identified service.
5. **RIGHT-CLICK:** Service → "Restart".
6. **IF** Service Status = "Running" (after 30 seconds)
7. **THEN** confirm resolution with client.
8. **ELSE** log event ID 7034/7031, create escalation ticket.

 Audit where your SOPs and KB data lives. Review consistency and accuracy. Determine how structured the data are.



Precision – Sales-to-Service Alignment

The "Special Snowflake" Audit is critical. Every custom solution sold that doesn't fit your service engine creates a roadblock for AI. Precision demands a limited menu of supported standards, ensuring scalability and predictable outcomes.

- ① Audit- review your agreements and contracts in your PSA.
What requires manual intervention before invoicing?
Which contracts have services that no other client has?



Accountability – The Daily Disciplines

Accountability starts with **clean, real-time data**. It's the foundation for any effective AI strategy, enabling intelligent insights and automated actions.

- Does everyone on your team know what they must do every morning and every evening at the start and end of each day to ensure they helped the team, did a good job and created value? Focusing your teams on structured routines that aid in driving KPIs resulting in positive financial outcomes is critical.
- ⓘ Audit- sit with your techs and see how each one starts their day and ends their day? Are the consistent? Are they prepared? Are they setting themselves and team up for success the next day?

The 15-Minute Standup

We don't tell stories. We look at the numbers.



SLAs

Are we in the green? Identify any ticket about to breach — before it does.



Kill Rate

Are we closing more than we're opening? This single number tells you if the desk is healthy.



Team Utilization

Is the workload balanced? No tech drowning while another is idle.



High Priority Tickets

What is actively blocking speed right now? Surface it. Own it. Move it.



Fifteen minutes. Every morning. No exceptions.



The Tech Scorecard

3-5 KPIs. No more. No less.

Tickets Closed

Are you moving the queue?

Avg. Time / Ticket

Are you working efficiently?

Escalation Rate

Are you solving or passing?

Open Queue Count

Is the desk healthy or drowning?

Morning Startup

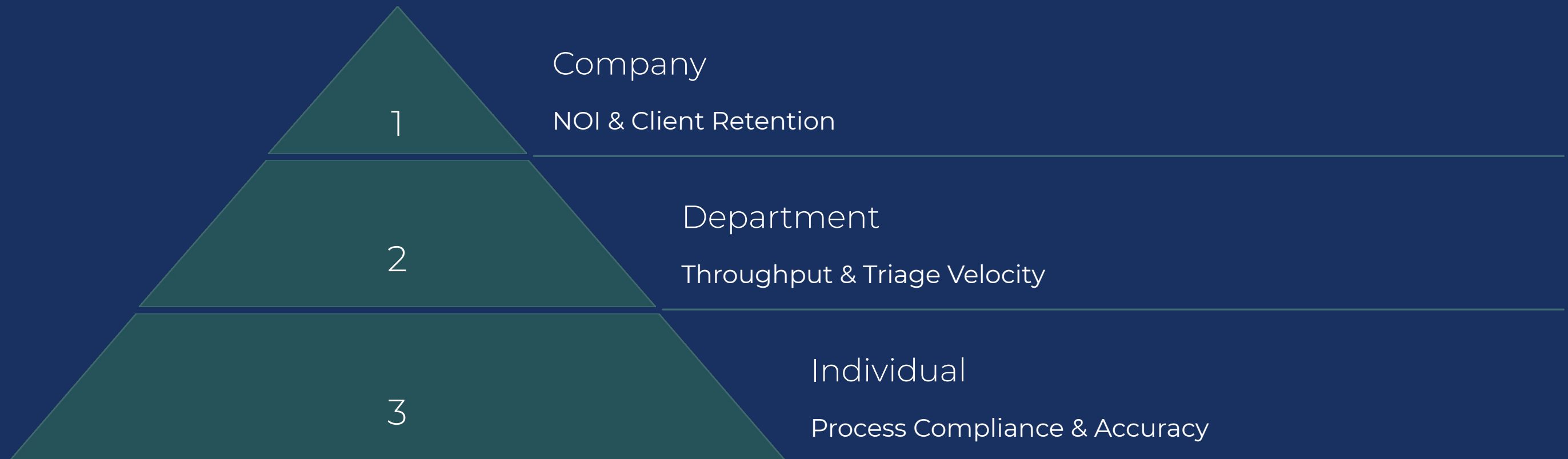
- Scan for aging tickets
- Flag VIP requests
- Lock in today's Must-Fix priorities

Evening Shutdown

- All time logged
- Notes crisp for the next tech
- Every artifact status updated

Accountability – The KPI Hierarchy

Effective stewardship is built on a clear, tiered measurement map that links individual actions to company-wide success.



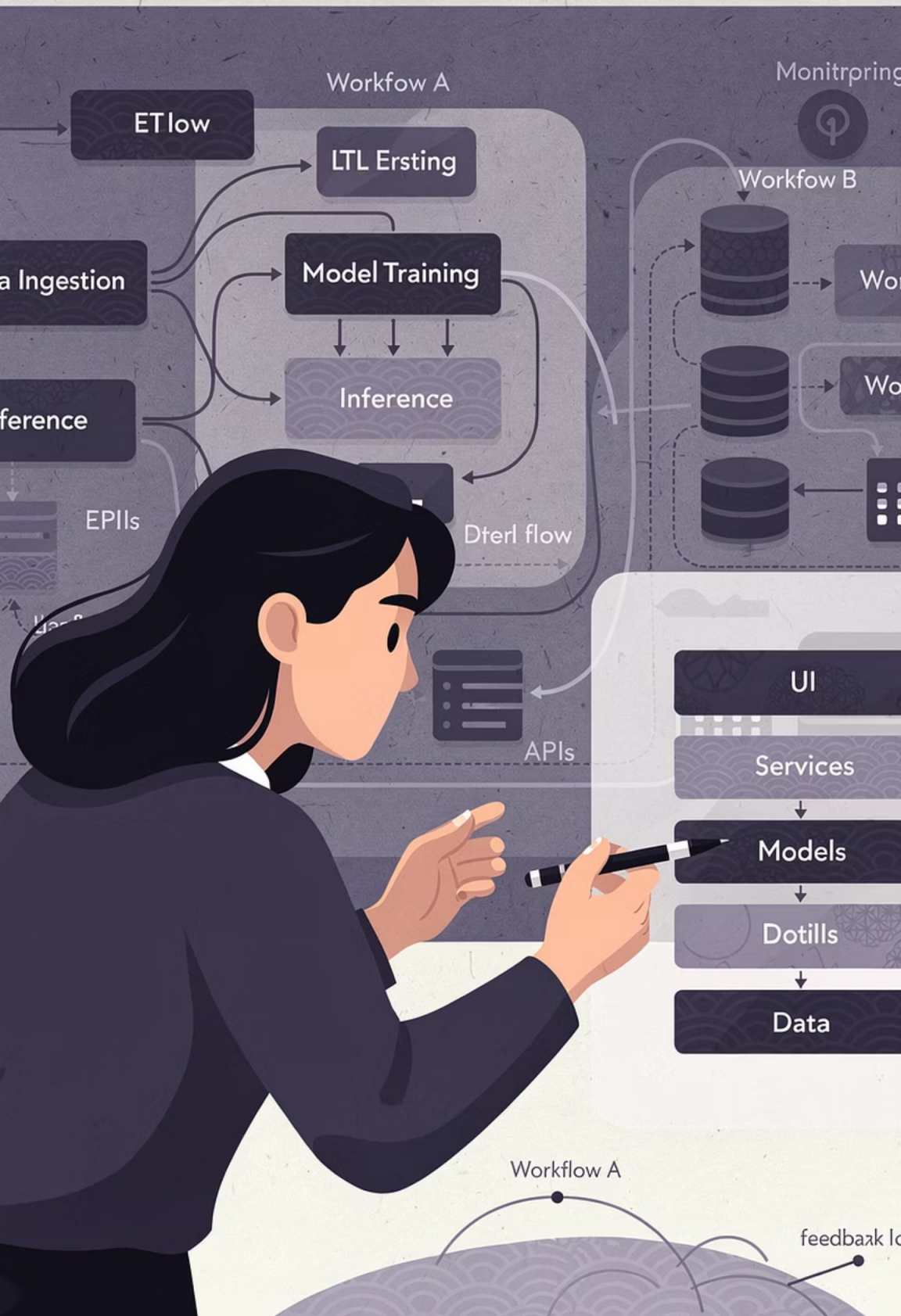
Audit what KPIs are in place for each role, department and key driver to your business. Focus on understanding how clean those data are what processes impact those KPIs.

Accountability – Feedback Loop (1-on-1s)

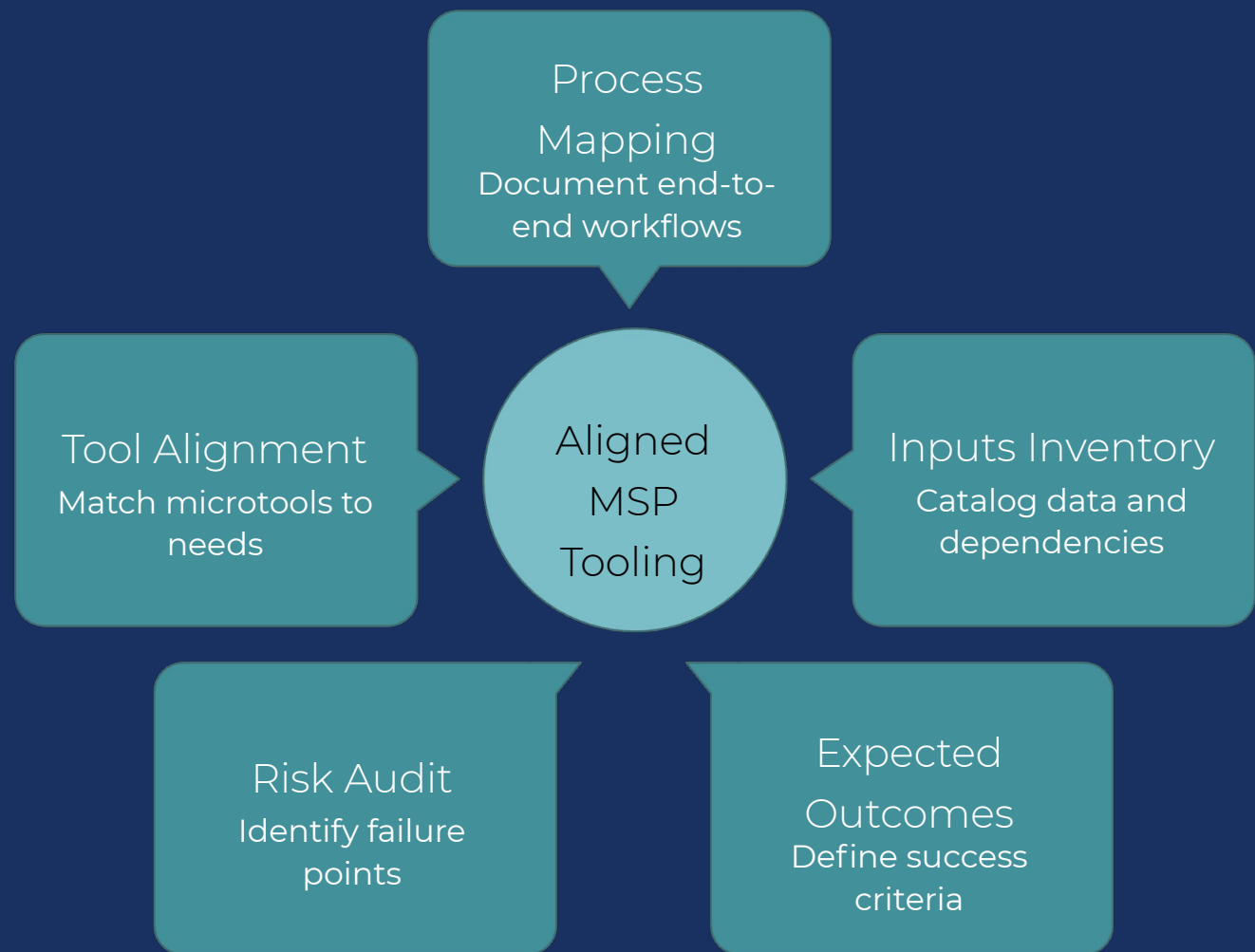
During 1-on-1s, management must shift from "Status Checking" to "Process Auditing." The goal is to identify where the process failed the human, not merely where the human failed the task.

- Audit how often 1 on 1s occur. What is being discussed? Does the employee know what KPIs they are responsible for? Are they following their daily disciplines?





The AI Readiness Imperative



Before you automate, understand. Ensure your foundation is solid before integrating AI into your systems and processes.

The Refined Service Ops Framework

Three Pillars. One Engine. Built to Last.

Momentum

Work Manifests + Triage Logic + Escalation Rules → **Zero Friction:** Work reaches the right place at the right time & is closed with precision for further process and data enrichment.

Precision

Client Comms + Standardized Documentation + Uniform Service Contracts → **Reliability:** The client receives a predictable, permanent fix based on the standard expectations set for all solution outcomes.

Accountability

Outcome KPIs + Daily Disciplines + 1-on-1 Reviews → **Consistency:** The process is followed every time, by everyone with a clear understanding of what outcomes they are responsible for.

The Evergreen Service Desk

Built for today. Ready for whatever AI comes next.

📄 AI capability is doubling every 3–6 months. The tools will change. The engine — **Momentum, Precision, Accountability** — never will.

AI + Momentum

AI needs consistent inputs and workflows to know what to work on and when.

AI + Precision

AI needs your documentation, sales alignment and communication baselines to create quality outcomes.

AI + Accountability

AI needs your governance to stay on track and augment your team rather than displace them.





Free Client Onboarding Checklist!

www.ridgeviewadvisors.com

amoore@ridgeviewadvisors.com

www.linkedin.com/in/

[andrewpmoore](https://www.linkedin.com/in/andrewpmoore)