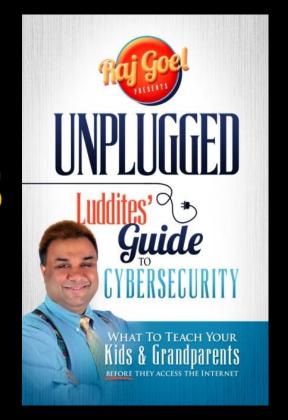
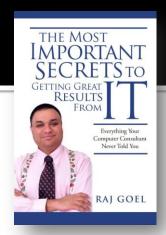
# Creating OBVIOUS SOPs



Raj Goel, CISSP

http://www.rajgoel.com/?s=dojo



## Raj Goel, CISSP

- Author, entrepreneur, IT expert and public speaker, Raj Goel is globally known as the go-to man in cyber security and privacy law. He is committed to educating individuals and organizations about online safety and how to protect their most important assets people and data. His expert advice helps individuals, companies and conglomerates navigate their way through the world's ever-changing technology and increasingly complex IT compliance laws. He often appears in the media and at conferences world-wide to educate the public on cyber-security and digital privacy, a subject he is passionate about.
  - » Security, Civil Liberties and Peace of Mind
- When you need the right approach to complying with HIPAA/HITECH, PCI-DSS or simply protecting your assets, Raj Goel, as any of his loyal clients will tell you, is the man to call upon. Raj's credentials are impeccable. A 25-year veteran of the IT industry and an expert in online security, Raj has personally consulted with organizations ranging from Fortune 100 corporations to small family companies to governments world wide.
- Raj is fueled by his passion for enhancing Civil Rights in Cyberspace, his love of helping people keep themselves, their families and their companies safe online. He is available as a consultant and a public speaker and often sought after by major media outlets and companies.
- » Key highlights:
  - Author, "UNPLUGGED Luddites Guide To Cybersecurity", <u>Amazon</u>, 2015
  - Author, "The Most Important Secrets To Getting Great Results From IT", Amazon, 2012
  - On-Air Television Cybersecurity Expert, <u>WPIX11</u>,
     New York City (2013-present)
  - On-Air Cybersecurity Expert, Columbia News Tonight, Columbia University, NYC
  - Keynote speaker, NCSL 2013, <u>Government of</u> Netherlands, The Haque, Netherlands
  - Keynote speaker, <u>Government Of Curacao</u>, 2013

- Keynote speaker, "what should MSP's know about compliance", <u>Datto</u> partner conference, 2013
- Author, "Googling Your Privacy and Security Away", Infosecurity Professional Magazine
- Author, "Trends In Financial Crimes", <u>Infosecurity</u>
   Professional Magazine
- Author, "Life Of A Child (2014) raising a generation of cyber-at-risk youth", <u>Infosecurity</u> <u>Professional Magazine</u>, 2014
- Author, "Welcome To The World Of Dating Sites", <u>Infosecurity Professional Magazine</u>, 2015



## **Media Appearances**





Global Business and Technology Association™



**Entrepreneur** 



## The New York Times

(ISC)<sup>2</sup>

SECURITY TRANSCENDS TECHNOLOGY™

BrightTALK™





















## Raj Goel, CISSP – MSP Credentials

- » Keynote Speaker DATTO 2013 What MSPs should know About Compliance
- » Presenter/Speaker:
  - Cyberoam Partner Conference 2014
  - Cyberoam Webinars
  - Continuum Navigate 2015
  - MSPRadio
  - ITNation 2015
- » 2014 Finalist, TechnologyMarketingToolkit (Robin Robins)
- » Author, 2 books



## Book 2 Launch Party!!



## **About BRAINLINK**

- ✓ Founded in 1994
- Profiled in NYTimes, Entrepreneur, PBS,
   WPIX11, etc
- Passionate about SOPs, SOTs, Process and Profitability
- ✓ Award Winning MSP 2015 SmartCEO Magazine Winner for our "SOP Culture"



## Why SOPs?

"When I say that the company's prosperity rests on such things as our <u>sixty-six-steps-to-clean-a-room manual</u>, I'm not exaggerating,"
J.W. Marriott Junior

http://www.economist.com/news/christmas-specials/21591743-be-my-quest

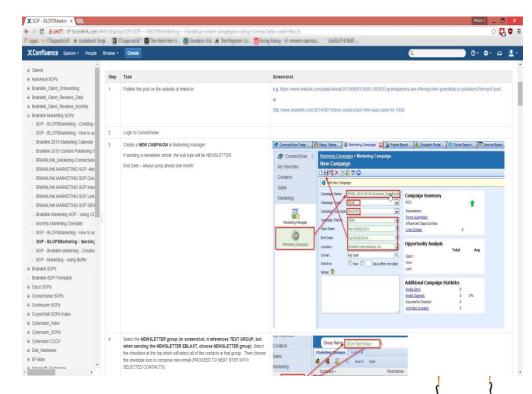


### What's an SOP?

## **Standard Operating Procedure**

- It's how you do something repeatedly, without deviation or failure
  - Any changes or updates are reflected in an updated SOP

## No great brand thrives without building SOPs



## **SOP Template**

#### **SAMPLE SOP**

Purpose: This is how we document repeatable, reproducible processes

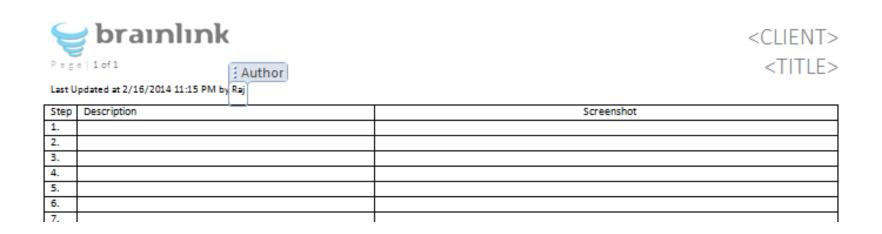
Audience: Brainlink Technical and Marketing Employees

Step#	Description	Screenshot

Stay tuned till the end to get your free SOP template.



## SOP Example



Brainlink's SOP template



## **Brainlink's SOP Culture**

- Our team lives by this mantra
  - You are either USING an SOP
  - Or you are MODIFYING an exiting SOP
  - Or you are CREATING a new SOP
  - 4. Or you're looking for another job
- In 2014-2015, I hired 14 techs.
  - 12 were terminated.
    - 10 for not adopting the SOP culture.



## What are OBVIOUS SOPs?

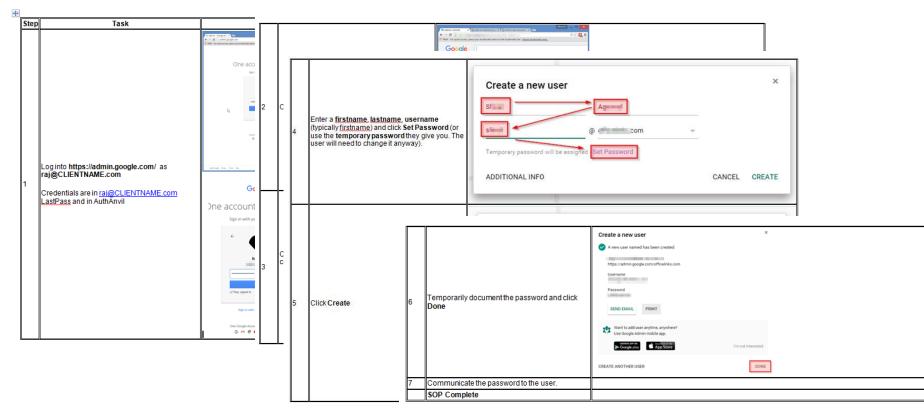
#	Setting up a new employee	SOP Links
1	Gmail account, alias (if any) and distribution groups	SOP - Gmail - Creating a New Account
		SOP - Gmail - Creating an Alias
2	Add to LASTPASS and share groups	SOP Adding a new user to LASTPASS
3	Add to SLACK	SOP - SLACK - Adding Employees to SLACK
4	Add to ASANA	
5	Add to F	SOP Creating HOSTEDSUITES account
6	Add to	SOP Adding Employee to
7	Add to	SOP Add New Employee to

 All the SOPs needed to setup an Employee



## Example #1 – Creating a GMAIL Account

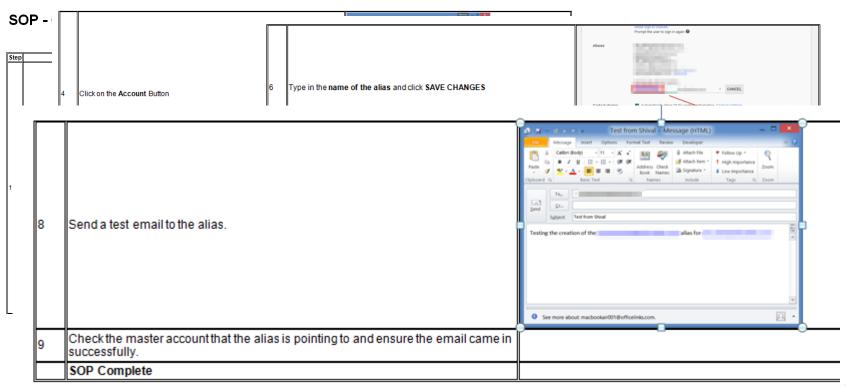
#### SOP - CLIENTNAME - Gmail - Creating a New Account



Document the "gee, everyone knows this"



## Example #2 – Creating a GMAIL Alias

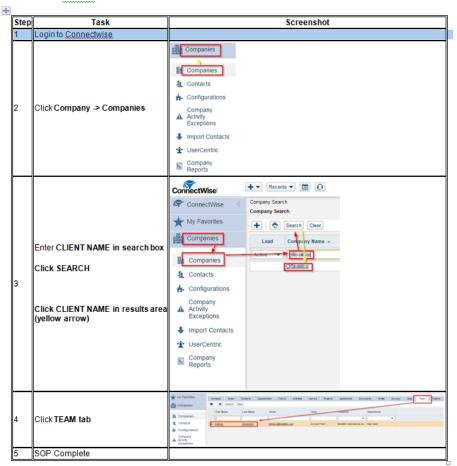


This was created after I wasted an hour



## Example #2 – 5 Step SOP

#### Brainlink - SOP - <u>Connectwise</u> - Setting Default Tech For A Client



This will save you hours...



## **Key Benefits**

- Lower Staff Training Costs
- Better Employees
- Consistency in client experience
- Better Documentation



## **Key Challenges**

- Your techs don't know HOW to document properly
- You don't know how to TRAIN them in proper SOPs
- Your team lacks the SOP Culture



## **Accelerating Staff Training**

Build a list of WHAT you want your
 employees to learn

#	Туре	SOP	
1	Core Setup	101-BRAINLINK-SOP-Cyberoam-Initial_Unboxing_and_Setup	
2	Core Setup	102 SOP - Brainlink - Cyberoam - Upgrading Firmware	
3	Basic Networking Setup	Setting up Network Interfaces - SOP Needed	
4	Basic Networking Setup	SOP - Brainlink - Cyberoam - Creating Network Hosts Objects	
		BRAINLINK-SOP-Cyberoam-Adding Network Services Objects	
5	Basic Networking Setup	Setting up Firewall Rules - SOP Needed	
6	Basic Networking Setup	904 SOP - Brainlink - Cyberoam - Creating Virtual Hosts	
7	Basic Networking Setup	Configuring Static Routes - SOP Needed	
8	Basic Networking Setup	Setup DHCP Scopes - SOP Needed	
		SOP - Cyberoam - DHCP - Create Static DHCP Reservations	
9	Basic Networking Setup	905 Brainlink - SOP - Cyberoam Establishing Site to Site VPN between two Cyberoams	
10	Basic Networking Setup	SSL VPN - Must determine which SOP to keep	
		BRAINLINK-SOP-CYBEROAM-SSL VPN Configuration Setup	
		906 SOP - Brainlink - Cyberoam - VPN - SSL VPN Cyberoam Setup	
		.SOP - Brainlink - Cyberoam - VPN - SSL VPN Cyberoam and Windows 7 Setup v1.0	
11	Basic Networking Setup	Load Balancing - SOP Needed	
12	Security and Reporting Setup	.BRAINLINK - SOP - Adding Firewalls To iView v1.0	
13	Security and Reporting Setup	SOP - Brainlink - Cyberoam - Set per user internet access, web filter, applications policy	
		906 Brainlink-SOP-Cyberoam-Web Filtering-Applying to All Network Traffic	
		BRAINLINK-SOP-Cyberoam-Pushing Web Filter Policies to Multiple Cyberoams	
14	Security and Reporting Setup	SOP - Brainlink - CCC - Creating and Deploying the CryptoWall IPS Policy	
15	Security and Reporting Setup	920 Brainlink - SOP - CYBEROAM-Cyberoam_SSO_AD_Setup	
		SOP - Brainlink - Cyberoam - Troubleshooting CTAS and SSO Related Timeouts	

## **Accelerating Staff Training**

#### Build it into your hiring process

#### New Hire Training Process

Week	Tasks	Pages
1	a. W2, employee agreement, AUP, NDA signing	
	b. Skype, text, email TEAM COMMUNICATION training	
	Daily team call status updates How to respond to SKYPE STATUS UPDATE requests How to respond to TEXT STATUS UPDATE requests Daily EMAIL status summary	
	Developing SOPS	SOP - Brainlink - Greenshot - Setup and Use
	Accessing the CONTINUUM A+, Network+, MCSA, MCSE training portal	SOP - Brainlink - Training - Accessing Certification Training from ConnectWise
	c. ConnectWise Training Completion  Training Video:	Brainlink - SOP - Creating Configurations in Connectwise
	http://sop.brainlink.com/files/,private/2014-08- 03%20- %20Brainlink%20ConnectWise%20Training%20- %20Distilled.mp4 • Timesheet tracking & review	Brainlink-SOP-Creating an SOP and Posting it to Connectwise
		SOP - Brainlink - Continuum/Connectwise - Opening a NOC Ticket to Resolve Backup issues
		BRAINLINK-SOP-Creating Service Order Templates SOT from SOP
	b. Continuum Ticket Handling	SOP - Continuum - Creating and Assigning COMMUNICATOR
	c. Read and be able to discuss Raj's Book	
	a. Daily Support/Ticket handling	
	EMAIL response training     Raj or Shival review ALL client-facing communications	
	b. Ability to search/find data in CONFLUENCE, SOPS, CONNECTWISE on our clients/processes	
	Read the BRAINLINK MSP Agreement and SAMPLE PROPOSAL	

2	c. ND Reports - Phase 1 (run) & Phase 2 (reporting)	BRAINLINK-SOP-Generating Network Detective Reports BRAINLINK-SOP-Importing NetworkDetective Data Into Connectwise
	d. Configuration / Confluence Updates	
	e. Perform DAILY BACKUP & IVIEW reviews	SOP - Brainlink - Continuum - Vault DBR Process
		Daily Backups Review Template
		BRAINLINK-SOP-DATTO-recover Off Datto Vault into ESXi local store
	f. Brainlink RATES & CONTRACTS review	
	a. Runbook review	
	Tech has read a client runbook.	
	Can answer:	
	How many locations?	
	Printers?	
	Who has Dymo (or timberline or Bloomberg)	
	What is their wifi password?	
	How many servers, desktops, which firewall, etc.	_



## **Accelerating Staff Training**

#### Discuss it in interviews – HIRING & REVIEWS

brainlink
You run your business and leave the IT to us.

Raj Goel, CISSP Co-Founder, CEO raj@brainlink.com 917-685-7731

Windows  Active Directory Group Policy  New User Setups  Distribution Groups  UNK  Organizational Units  Disabling Users  SOP Chrome for Work - Server and Policy  Configuration  Deployment - New User Setup  SOP Exchange - Creating a Distribution List	
New User Setups  Distribution Groups  Organizational Units  SOP Deployment - New User Setup  SOP Deployment - New User Setup  SOP - Fechange - Creating a Distribution List	
UNK  Distribution Groups  Configuration  SOP Chrome for Work - Server and Policy Configuration  SOP - Deployment - New User Setup  SOP Exchange - Creating a Distribution List	
UNK Organizational Units  SOP Deployment - New User Setup  SOP Exchange - Creating a Distribution List	
Organizational Units  SOP Deployment - New User Setup  SOP Fychance - Creating a Distribution List	
Disabling Users SOP - Exchange - Creating a Distribution List	
Creating Domains Group Policy, Login Script, Drive Mapping Changes	
Mapping Drive letters via scripts and/or via group policy	
BRAINLINK-SOP-Installing ESXi 5.5	
4 e. Install VMWare Server via SOP BRAINLINK-SOP-Provisioning Local Storage in ESXI	
Brainlink - SOP - ESXi - Accessing ESXi Servers	
f. Configure 2x vmware servers to attach to iSCSI round-robin  SOP - Brainlink - ESXi - Setting up Round Robin iSCSI with Thecus	
5 a. Install AD + AD2 + Exchange 2010 via SOP Server 2008 + Exchange 2010 Setup (Gallin)	
b. Client Communication Training	$\top$
1) Prioritizing	
2) Scheduling	
3) Triaging	
6 Cyberoam ONLINE Training Completion	╗



Raj Goel, CISSP Co-Founder, CEO raj@brainlink.com 917-685-7731

	IView	BRAINLINK-SOP-Using IVIEW to perform traffic analysis		
7	Service Desk Handling	SOP - Deployment - Assigning Setups to NOC		
	Mac OSX	OfficeLinks Mac OSX Setup		
	Dell Hardware Alerts	BRAINLINK-SOP-Responding to Dell Server Hardware Alerts		
	Hats for the New Person to Wear  Daily BACKUPS & IVIEW review Monthly ND Reports  - Win2008 Training Start - Oyberoam Training - Training the next person			
	Service Board Triage - Tag tickets with priority - Tag tickets with a schedule - Assign tickets to relevant technicians - Follow-up Tregularity			

Current NEW HIRE 90-day training runbook: 997 pages



## Develop the RUNBOOK

#### Runbooks are CRITICAL to focused training

#### Table of Contents

1	DAY1 - Laptop & Email Setup		6
2	Software to Add to SOP		25
3	Developing SOPS		46
4	Accessing the CONTINUUM A+, Network+, MCSA, MCSE training portal		55
5	DAY2 - ConnectWise Training Completion		60
6	Connectwise		61
7	Brainlink - SOP - Creating Configurations in Connectwise		62
8	Continuum Ticket Handling		96
9	Daily Support/Ticket handling	1	105
10	DAY 3 - Perform DAILY BACKUP & IVIEW reviews	1	106
10.1	Name/Summary:		127
10.2	Detail Description:	4	127



## Develop the RUNBOOK

#### Ours is 997 LEGAL pages long

19	Exchange Mailbox Databases	877
20	Moving a User between Databases	878
21	Report - 8/27/13	879
22	WEEK7 - Windows	881
23	Removing Users from a Distribution list	938
24	Adding Users to a Distribution list	940



## **Develop the RUNBOOK**

#### We build them for client hires as well

#### Table of Contents

1.1	HIGH LEVEL OVERVIEW OF ROLE:	3
2	SOPS & Connectwise	4
3	SOP - How To Create SOPs in Confluence	10
4	IT OPERATIONS	18
5	OPENEYE	24
5.1	RADIUS	79
6	KERI	310
7	ANDOVER	323
8	TECHEYE, DIVIS, etc.	332
9	NEC PHONE System	405
10	SYSTEMS DOCUMENTATION	419
11	Photographs	420



## Track The Training!!

Connectwise is your friend

#157 - J & TRAINING for BLOPS		Status
Project Totals	,	In Progress
▼ Paperwork	Phase 1	Open
Employment Offer	43130	Completed
Signed NDA	43131	Completed
Signed Employment Agreement	43132	Completed
Signed CONFIDENTIALITY & INVENTION Agreement	43133	Completed
Provided Drivers License & SSN card	43134	Completed
▼ Access & Accounts	Phase 2	Open
Brainlink.net account setup	43135	Completed
Connectwise account created	43136	Completed
Confluence account created	43137	Completed
Continuum Account created	43138	Completed
Add cell phone to Brainlink's google voice	43139	Open
▼ SOPs Trained	Phase 3	Open
▼ Week1	Phase 3.1	Open
Install & Accessed Connectwise	43140	>Cancelled
Install NOC agent & AV onto laptop	43141	>Cancelled
Email setup on laptop & phone	43142	>Cancelled
Software to Add to laptop	43143	>Cancelled
Review & Discuss the DAILY WORKLOG format	43144	Completed
Accessing the CONTINUUM A , Network , MCSA, MCSE training porta	43145	Open
ConnectWise Training Completion	43146	Completed
Developing SOPS	43147	Completed

Creating an SOP and posting it to Connectwise	43149	Open
Creating an SOT from SOP	43150	Completed
Daily Support/Ticket handling	43151	Open
Perform DAILY BACKUP & IVIEW reviews	43152	Open
Opening a NOC ticket to resolve backup issues	43153	Open
Continuum Communicator Install	43154	Open
Webroot AV dashboard - needs NEW SOPs	43155	Open
Reflexion & GFI Spam filtering process	43156	Open
▼ Week2	Phase 3.2	Open
Onboarding and offboarding new employees	43157	Open
WEEK2 - Install VMWare Server	43158	Completed
Install RNK Desktop	43159	Completed
Install HALCRAFT Desktop	43160	Completed
Install GALLIN Desktop	<u>43161</u>	Completed
Install Arbiter Desktop	43162	Completed
PRTG Alerts reading	43163	Completed
PRTG DNS & HTTP alert setup	43164	Completed
▼ Week3	Phase 3.3	Open
Install AD + AD2 + Exchange 2010 via SOP	43165	Completed
Cyberoam Training Completion	43166	Open
▼ Week4	Phase 3.4	Open
Windows SOPs	<u>43168</u>	Open
Outlook SOPs	43167	Open
Exchange	43169	Completed
Network Detective	43170	Open
NEWT	43171	Open



## Pay The Piper

#### Service Team Member Roles

Level	Title	Level Certifications	Required Certifications	Base Annual Salary TBD
1	Desktop Technician	Connectwise Training, Continuum Certified IT Expert	0	2000
		CompTIA A+,	2	3000
		MCSA Desktop 1 (680 or 687)	3	37000
2	Desktop Administrator	MCSA Desktop 2 (685 or 688),	4	0000
		CompTIA Network+ OR CCNA	5	000
		Cyberoam CCNSP Certified	6	600
		VMWare VTSP,	7	6000
		VMWare VSP	8	100
3	Systems Engineer	CompTIA Security+,	9	0000
		MCSA Server (410)	10	600
		MCSA Server (411),	11	6000
		MCSA Server (412)	12	600
		Datto	13	600
4	Senior Systems Engineer	MCSE Server (413)	14	1000
		MCSE Server (414),	15	1000
		VMWare VCP	16	1000
5	Virtualization Rockstar	All Above Certifications	ALL	1000

We tie raises & bonuses to training



## How do you do this for yourself?

- Adopt the SOP mindset
- License our SOP library
- Develop the SOP CULTURE
- PROFIT!!!



#### Resources

- 1. https://attendee.gotowebinar.com/recording/5011078477814407682
- http://www.brainlink.com/2014/12/17/secret-to-brainlinks-success-process-and-sops/
- 3. http://www.brainlink.com/2015/04/24/the-joy-of-sops/
- 4. <u>http://www.brainlink.com/about-us/media/how-to-build-excellent-standard-operating-procedures-that-will-drive-business-growth-mspradio-47/</u>
- 5. http://www.brainlink.com/2015/05/30/the-joy-of-sops-2/
- 6. <a href="http://www.brainlink.com/2015/07/08/the-joy-of-sops-better-than-pizza-better-than-chocolate-better-than-sex-how-to-create-effective-sops/">http://www.brainlink.com/2015/07/08/the-joy-of-sops-better-than-pizza-better-than-chocolate-better-than-sex-how-to-create-effective-sops/</a>
- 7. <a href="http://www.brainlink.com/first-fridays-with-raj-2/">http://www.brainlink.com/first-fridays-with-raj-2/</a>
- 8. <a href="http://www.brainlink.com/2015/10/27/creating-obvious-sops/">http://www.brainlink.com/2015/10/27/creating-obvious-sops/</a>
- 9. <a href="http://www.brainlink.com/files/2014/02/SOP\_Template.doc.docx">http://www.brainlink.com/files/2014/02/SOP\_Template.doc.docx</a>



## **Questions?**





### **Contact Information**

#### Raj Goel, CISSP

Chief Technology Officer Brainlink International, Inc. C: 917-685-7731 raj@brainlink.com www.RajGoel.com www.linkedin.com/in/rajgoel @rajgoel\_ny

Author of

#### **UNPLUGGED Luddites Guide To Cybersecurity**

http://www.amazon.com/UNPLUGGED-Luddites-Guide-CyberSecurity-Grandparents/dp/0984424830/

## The Most Important Secrets To Getting Great Results From IT

http://www.amazon.com/gp/product/0984424814

