Encore Strategic Benchmarking

The Encore Strategic Benchmarking app facilitates a standardized assessment of companies in peer groups using identified key performance indicators (KPIs). A benchmarking dashboard displays 16 financial KPIs and provides a comprehensive summary for improving performance. Developed in partnership with Encore Strategic Consulting, the app is available to the Encore GAIN Peer Group members. Membership to the GAIN peer groups is by invitation. If you are interested in joining, please contact our Encore partner, Shawn Walsh, at shawn@encorestrategic.io.

What's in this article?

- How to set up Encore Strategic Benchmarking
- What are the Encore Strategic Benchmarking dashboards?
  - Encore Strategic Financial KPI
  - Encore Strategic Consulting Peer Groups Benchmarking
- How to start using the Encore GAIN Peer Group Benchmarking
- Frequently asked questions
- Related Topics

How to set up Encore Strategic Benchmarking

1. Sign in or sign up with MSPbots using your Office account.
   If you don't have a Microsoft account, please follow the instructions in the article *How to Sign Up with MSPbots without Microsoft Office 365 Account*.
   If you have questions on data security, please check the MSPbots Data Security page.

2. After login, link your financial software to MSPbots. Below are the links to the instructions on connecting your software.
   - QuickBooks Online
   - QuickBooks On-Premise
   - Xero

   For a complete list of other supported software integrations with MSPbots and the steps for connecting them, please view the MSPbots Integrations page.

   If you don't have an accounting software integration or if your software is not supported:
   a. Launch the Encore Strategic Benchmarking App. On the MSPbots app, go to **Apps** and open **Encore Strategic Benchmarking**.
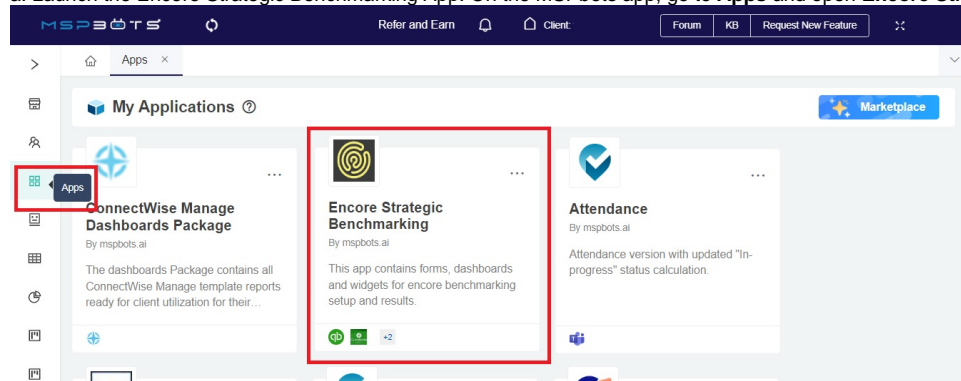

   b. Go to **Settings** and select **Encore Accounting Mapping Input Form**. Enter your details here.
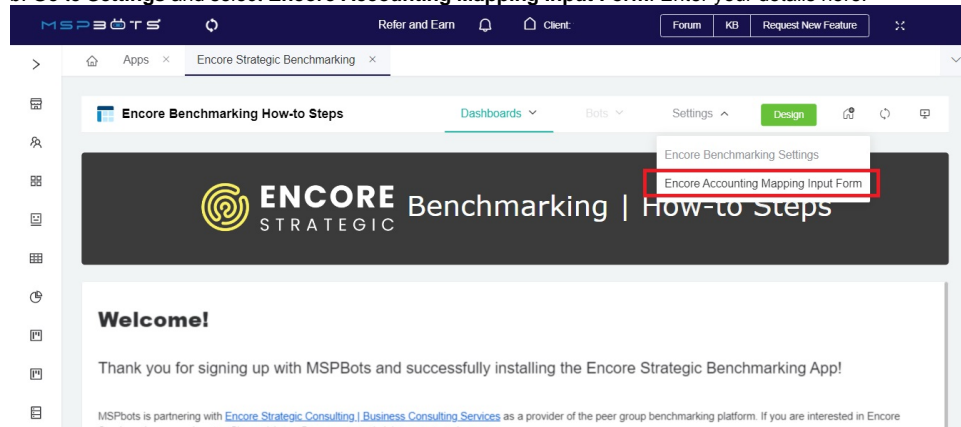
3. Add Shawn Walsh as a Consultant and grant him **Admin** and **Financial** roles. For instructions on how to add a consultant, please refer to the article *Consultant Management Feature*.

4. Map your financial software to Encore. On the MSPbots app, go to **Settings** > **Client Mapping**. Please read the article *How to Use Accounting Mapping for Encore* for the complete instructions.
For questions about the mapping, please connect with Shawn at shawn@encorestrategic.io.

5. Next, update your employee's headcount.
   a. Go to Settings and select **Encore Benchmarking Settings**.
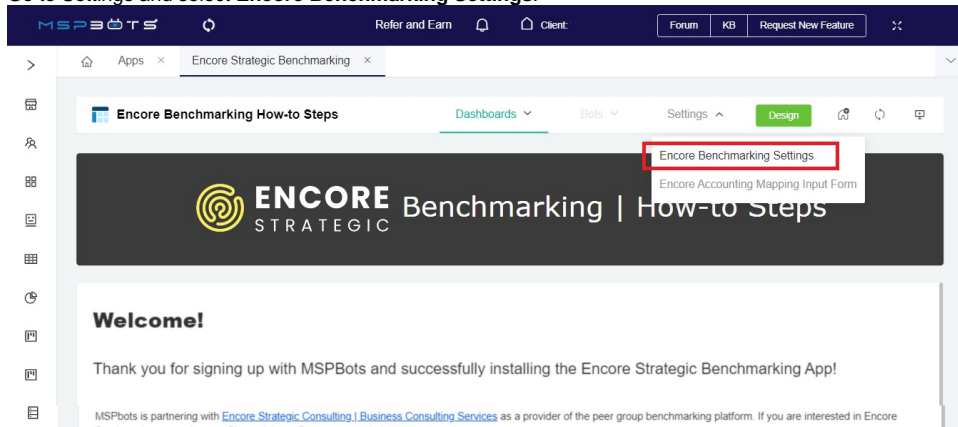
   b. On the Encore Benchmarking Employee Headcount Form, click **+New**.
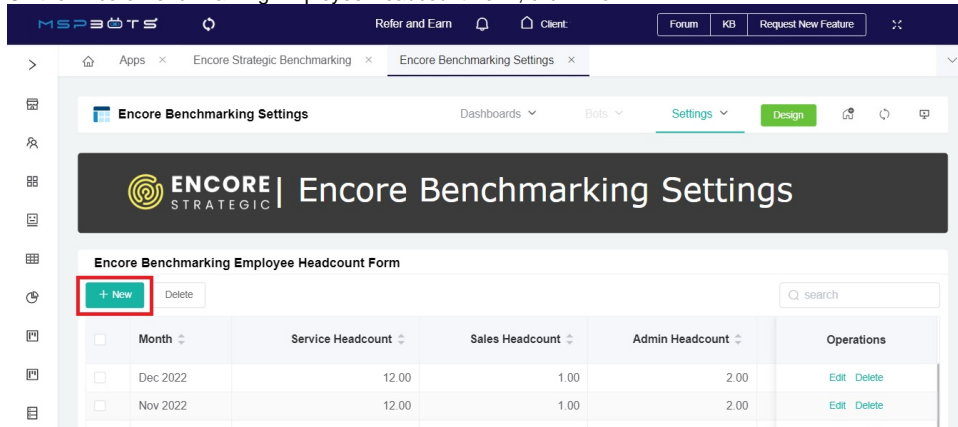
   c. Select a month and input the headcount for each type.

   d. Click **Add** when done.
      The Encore Benchmarking Employee Headcount should be updated monthly.
6. After connecting your software, mapping your accounts, and updating the headcount, you can now access the Encore dashboards.

What are the Encore Strategic Benchmarking dashboards?

You can view the dashboards from the **Encore Strategic Benchmarking** app. Navigate to **Dashboards** and select the dashboard you want to view.
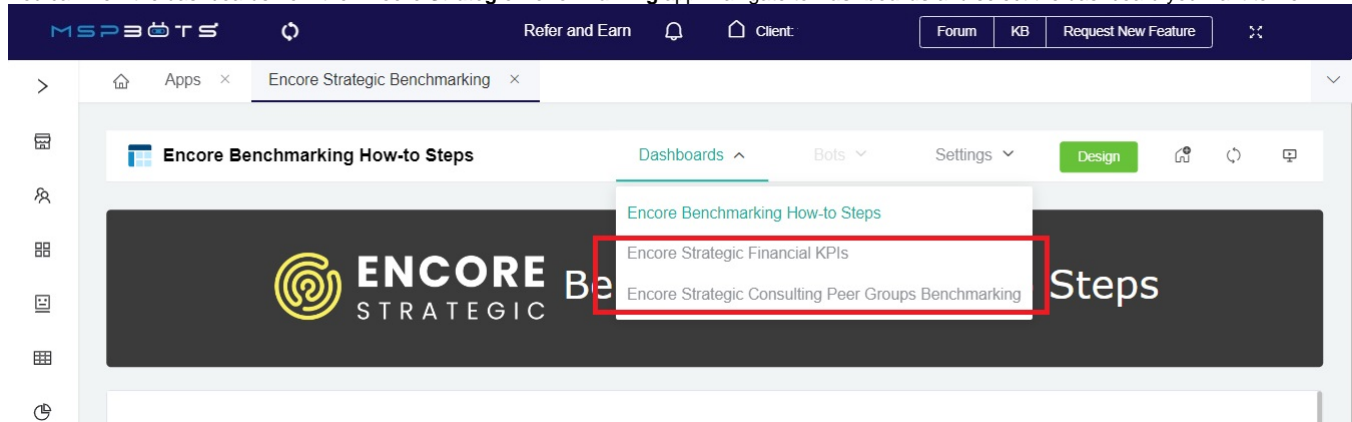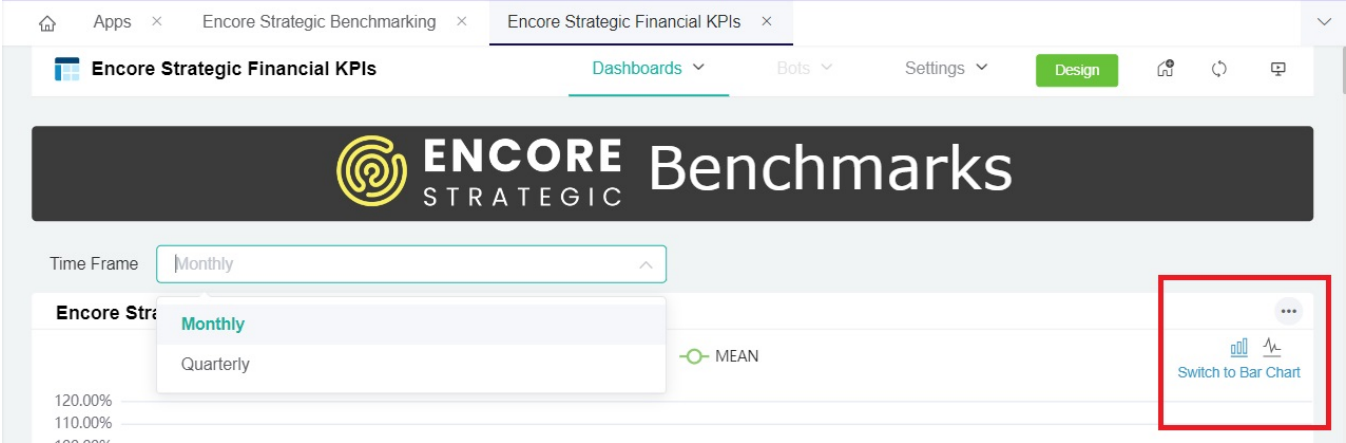

Encore Strategic Financial KPI

This dashboard shows your MSP's results from the 16 KPIs for Encore benchmarking. You can view the report monthly or quarterly using the **Time Frame** slicer. By default, the Encore Strategic Financial KPI dashboard shows the Actual and the Mean (average) measures over six quarters.
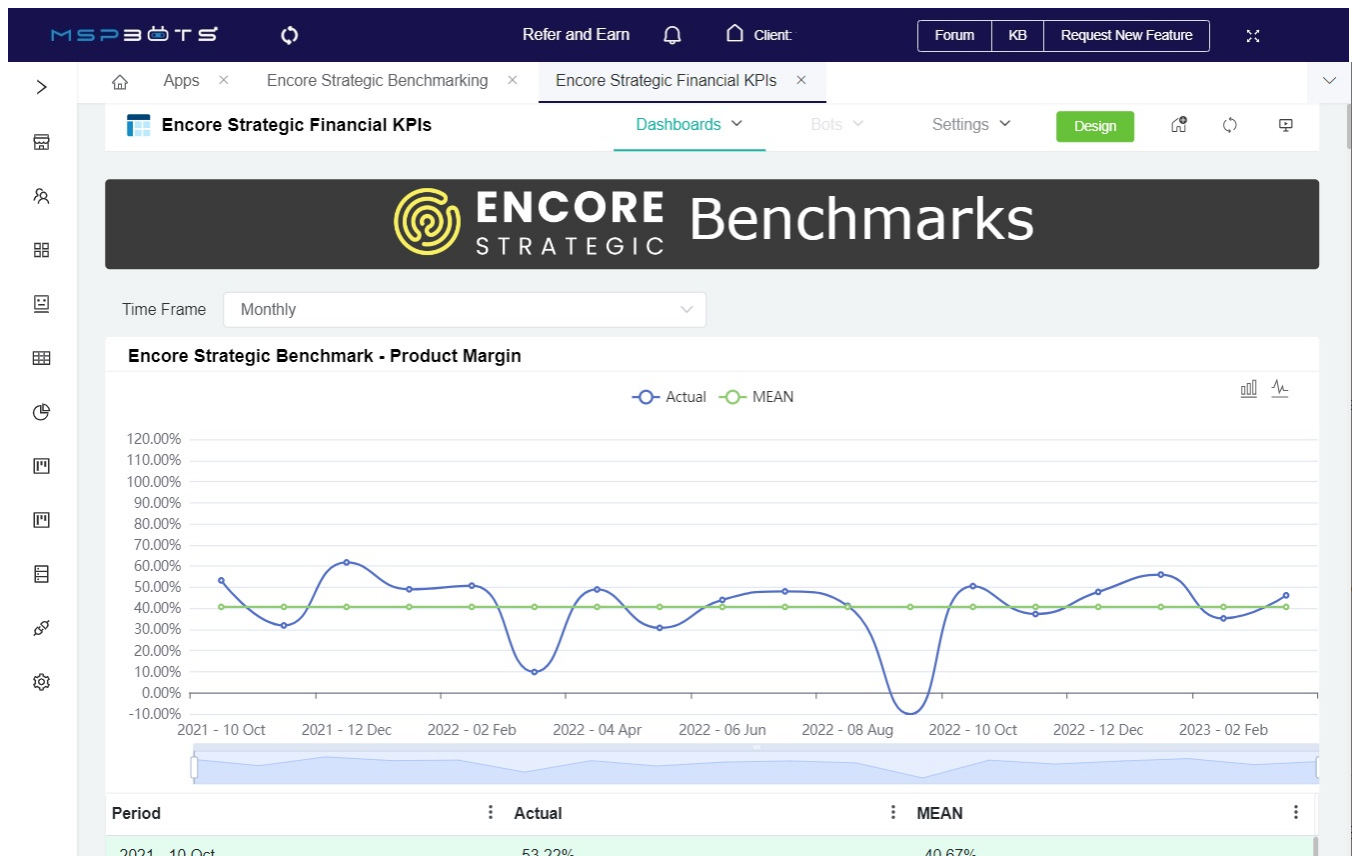
You can view the widgets as a bar or line chart.

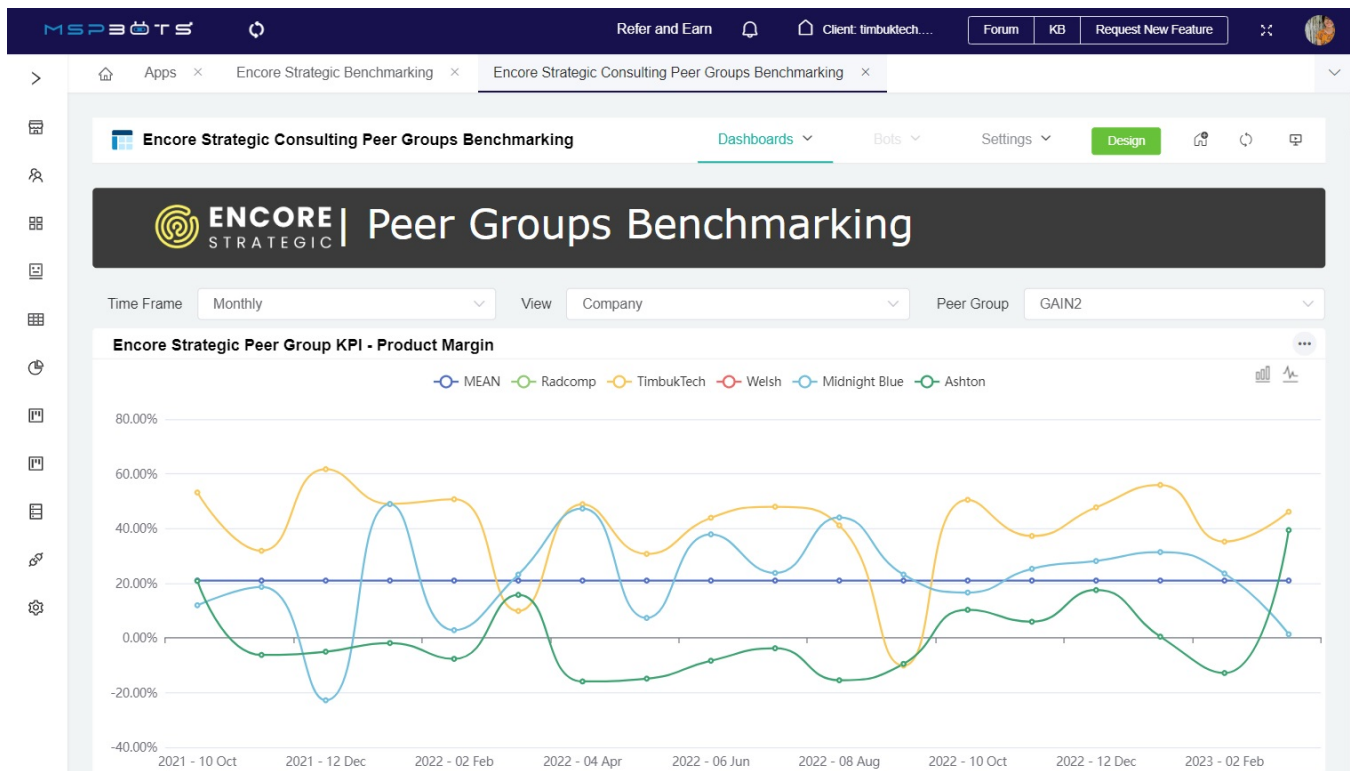
You can also edit your view of the tables.

Period	Actual	MEAN	
2021 - 10 Oct	53.22%	40.67%	Autofit all columns
2021 - 11 Nov	31.89%	40.67%	Autofit this column
2021 - 12 Dec	61.72%	40.67%	↑ Sort Ascending
2022 - 01 Jan	49.01%	40.67%	↓ Sort Descending
2022 - 02 Feb	50.73%	40.67%	Columns
2022 - 03 Mar	9.85%	40.67%	▼ Filter

☑ Period
☑ Actual
☑ MEAN

🕓 a few seconds ago

Encore Strategic Consulting Peer Groups Benchmarking

This dashboard shows how your MSP fares with other companies in your peer group. You can view the report monthly or quarterly and select the company or peer group that should appear on the widgets.

Like the Encore Strategic Financial KPI dashboard, you can view the widgets as a bar or line chart and edit your view of the tables.

How to start using the Encore GAIN Peer Group Benchmarking

A successfully set up Encore Strategic Benchmarking app entitles you to Encore GAIN Peer Groups access. Before you can access or join a group, please contact our Encore partner, Shawn Walsh, at shawn@encorestrategic.io first. Shawn will send you an invitation to join peer groups. Once you have accepted his invitation, your group will appear in the PeerGroup section in the MSPbots app. You can now start using the Peer Group feature.

Frequently asked questions

What should I do when my trial expires?
Your access to integration, GAIN-related reports, peer groups, and dashboards remain free when your trial expires. If you don't plan to use the other MSPbots features, you may continue using the app and ignore the end-of-trial popup.

How much is the Encore Benchmarking Service?
Your GAIN membership fee already includes the Encore Benchmarking fee.

Do GAIN members have a discount on the full version MSPbots?
Yes, GAIN members enjoy a 10% discount. Please reach out to Shawn Walsh to avail of this.

Related Topics

- How to Sign Up with Encore GAIN Peer Group Benchmarking
- How to Use Accounting Mapping for Encore