Managed IT Case Study

How a Capital Region MSP Put an AI Operator to Work

Industry: Managed IT Services / Computer Repair (MSP)
Client: A Capital Region MSP (managed services + computer repair)
Deployment: A dedicated, isolated Samantha instance on the client's own VPS

The Challenge

An MSP owner runs his business across a stack of disconnected vendor portals: Microsoft 365 for email and calendar, Datto RMM for fleet monitoring, RepairDesk for repair-shop invoicing, and WebRoot for antivirus. Every morning meant logging into each one to see what broke overnight. Monthly client status reports were built by hand. Antivirus licenses quietly billed for endpoints that were no longer paying customers. There was no single place to see the business, and no time to build one.

The Approach

We stood up a dedicated Samantha deployment on the client's own server, fully isolated from everyone else's data, reachable the way a busy owner actually works: over Telegram. No dashboard to log into, no new software for the team to learn. The assistant wires into all four vendor systems through their APIs and does the repetitive operational work in the background. The owner sees finished output and approves what matters. Nothing touches a customer without a human signing off.

What It Does Today

- Daily morning briefing at 7:00 AM: unread email and the day's calendar, summarized to Telegram.
- Daily Datto RMM fleet briefing: devices online and offline plus open alerts by priority, to Telegram.
- Weekly RepairDesk revenue rollup: prior week's invoices, gross, refunds, net, and top categories.
- Monthly per-client Datto status reports: drafted into Outlook for the owner to review, edit, and send. Never auto-sent.
- WebRoot antivirus cleanup: proposes inactive endpoints for deactivation to cut license waste, and waits for the owner's approval before acting.
- On-demand questions over Telegram: ask about any email, calendar event, or fleet status and get an answer in plain language.
- Every vendor API call is audit-logged, on the client's own isolated server and database.

The Guardrails Are the Point

- **Human-in-the-loop:** the assistant drafts and proposes; a person reviews and approves before anything goes out.

- **Customer-blind by design:** the assistant never communicates with the client's end customers. Reports are drafts only.
- **Billing-aware safety:** antivirus deactivation decisions are tied to live billing state, so a paying customer's protection is never dropped by mistake.

Proof in Practice

This is a live, paying deployment, running continuously since May 2026. Real, reconcilable data flows through it every day: weekly RepairDesk revenue numbers the owner can tie out to the penny, and live Datto fleet visibility across his managed sites. When an early version of the antivirus-cleanup logic flagged the wrong endpoints, the system surfaced the issue, every affected endpoint was restored, and the logic was rebuilt to key off billing status. The safety net worked, and got stronger.

On the Roadmap

Built but not yet live, and scoped with the client: online self-service antivirus sales with automated delivery, a win-back campaign for lapsed antivirus customers, a mobile-device security offering, CRM integration, and voice.

The takeaway for operators: the value is not a flashy console. It is that the repetitive cross-vendor work gets done in the background, the owner reviews finished drafts instead of building them, and the business runs while he sleeps. That is what we build.

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