

LOCKNET

AN EJOHNSON COMPANY



RESULTS AT A GLANCE

**Proposal Delivery
Time Reduced from
14 Days to Under 2
Hours**

**Prospect
Research Cut
from Hours to
Minutes**

**Operational Dashboards
Turn Reactive
Management Into
Proactive Guidance**

Locknet Managed IT is a managed IT services provider (MSP) and Kaseya partner specializing in serving community banks and mid-market organizations with 50–200 employee networks. Operating with a two-thirds service and one-third product revenue split, Locknet delivers comprehensive IT management, cybersecurity, cloud migration, and professional services across a multi-state region. With approximately 300 MSP clients, Locknet faces the dual challenge of scaling service delivery without proportionally scaling headcount while simultaneously driving new logo sales growth in an increasingly competitive market.

As Locknet's client base grew, their manual service delivery processes created bottlenecks that constrained both operational efficiency and revenue growth. Proposal generation required 14-day turnaround cycles with multiple handoffs between sales engineers, technical engineers, and account executives. Technical scoping involved back-and-forth communications that delayed client-facing deliverables. Account managers lacked real-time intelligence on client health and missed cross-sell and

"This is much more than a sales tool. It's an operational MSP tool that allows you to operate at such a high level, you're running laps around everybody else."

Peter Durnil
Director of Operations

upsell opportunities. Meanwhile, a team of account executives tasked with hunting new business was underperforming against year-to-date targets, and no systematic methodology for prospect research, meeting preparation, or pipeline acceleration.

Innovative Solutions, an AWS Premier Tier Services Partner, partnered with Locknet to deploy DarcyIQ, an AI-powered platform that transforms how MSPs operate across the entire service delivery lifecycle—from pre-sales through service delivery and account management. By integrating DarcyIQ with Locknet's existing technology stack including AutoTask (PSA), Ingram Micro (distribution), and HubSpot (CRM), Innovative enabled Locknet to automate proposal generation, accelerate technical scoping, enhance account intelligence, and empower their sales team with AI-driven prospecting and meeting coaching capabilities.

BUSINESS OBJECTIVES

Locknet's growth strategy required an operational platform that could scale service delivery while simultaneously driving revenue growth:

1

Scale Service Delivery Without Adding Headcount: Replace manual, multi-step processes for proposal generation, technical scoping, and account management with AI-powered automation that delivers faster client outcomes without proportional increases in staff. Locknet's President, Kris Kilgard, established a clear benchmark: if DarcyIQ saves one FTE's worth of time, Locknet won't eliminate that position—but they will delay the need to hire the next one, directly reducing operational expenditure growth.

2

Accelerate Proposal and SOW Turnaround: Reduce the 14-day proposal delivery cycle to a target of under 2 hours from client conversation to statement of work delivery, eliminating the multiple handoffs between sales engineers, technical engineers, and account executives that created delays and introduced errors.

3

Drive New Logo Sales Growth: Equip the account executive team with AI-powered prospecting, meeting preparation, live call coaching, and automated follow-up capabilities to increase bookings per rep and shorten sales cycles. Locknet's board identified new logo sales as a critical headwind requiring a fundamentally different approach.

4

Enhance Account Intelligence and Revenue Discovery: Provide technical account managers with real-time dashboards, automated QBR preparation, and opportunity identification across existing client accounts to surface cross-sell and upsell revenue that was being missed with manual processes.

THE CHALLENGE

Locknet's manual service delivery and sales processes created operational bottlenecks that constrained both efficiency and revenue growth:

Slow, Multi-Step Proposal Generation:

The existing proposal process required sales engineers to meet with clients, manually summarize findings, send requirements to technical engineers for hour estimates and hardware specifications, wait for engineer review and peer sign-off, then return to sales for final proposal assembly. This cycle typically spanned 14 days and involved four or more handoffs between team members. Each handoff introduced potential for miscommunication, scope creep, and re-quotes.

Manual Technical Scoping with Inconsistent Estimates:

Technical scoping depended entirely on individual engineer experience and availability. Engineers scoping identical projects returned estimates of 31, 23, and 25 hours—a variance that undermined pricing consistency and client confidence. Engineers were pulled between billable client work and internal scoping requests, creating bottlenecks that further delayed proposal delivery. The lack of standardized estimation methodology meant that proposals presented to executive committees often contained technical jargon that confused non-technical decision-makers.

Limited Sales Effectiveness and Pipeline Visibility:

Locknet's account executives operated without systematic prospect research tools, relying on manual Google searches and basic CRM data for meeting preparation. The team was behind on new logo sales year-to-date.

Missed Revenue Opportunities in Existing Accounts:

Technical account managers managing client relationships lacked real-time visibility into service ticket trends, contract renewal timelines, and cross-sell opportunities. Quarterly business review preparation was manual and time-consuming, often resulting in after-the-fact analysis rather than proactive account management. Opportunities to upsell cybersecurity, cloud migration, to existing clients were regularly missed because there was no systematic process for identifying and acting on them.

Operational Overhead Diverting Resources from Growth:

Maintaining manual processes across proposal generation, scoping, account

management, and sales consumed significant staff time that could have been focused on client-facing work and revenue generation. The constant need for multi-person coordination on routine deliverables increased costs while limiting the team's ability to pursue new business and develop innovative service offerings.

THE PARTNER SOLUTION: AI-POWERED MSP OPERATIONS PLATFORM

Innovative Solutions designed and implemented a comprehensive deployment program that transformed Locknet's operations through the DarcylQ AI platform, integrating with Locknet's existing technology stack and embedding AI capabilities across every stage of the MSP service delivery lifecycle.

AI-Powered Proposal and SOW Generation:

Innovative deployed DarcylQ with a custom Locknet Solution Architect agent that integrates directly with AutoTask for historical project data and Ingram Micro for real-time hardware availability and pricing. Sales engineers can now describe a client's needs in natural language—such as "client has 15 servers and wants to migrate to Azure"—and DarcylQ automatically generates a complete statement of work including scoped tasks, labor hours, hardware specifications, and pricing. The platform produces executive-ready proposals in non-technical language suitable for CEO and CFO audiences, eliminating the multiple handoffs that previously delayed delivery by days. An LOE Builder application was developed to provide template-based project scoping with dynamic question flows, auto-population of solution benefits and requirements, and direct PDF export capabilities, achieving 95% feature parity with existing manual processes while reducing creation time from hours to minutes.

Intelligent Technical Scoping with Continuous Learning:

Innovative implemented DarcylQ's scoping estimation tool calibrated with Locknet's project history and rate cards. Initial testing demonstrated accuracy within the range of human estimates—when systems engineers estimated identical projects at 31, 23, and 25 hours, DarcylQ estimated 28 hours, landing squarely in the middle. The system progressively learns from each project submission, adjusting labor estimates based on scope changes and incorporating feedback from engineer reviews. Integration with Ingram Micro provides automatic hardware specification and pricing, while estimate calibration controls allow engineers to specify project complexity, experience level, and deliverable quality to fine-tune hour calculations. A feedback loop routes completed LOEs back through the scoping tool to continuously improve accuracy.

AI-Driven Sales Enablement and Prospecting:

Innovative onboarded Locknet's account executive team with DarcyIQ's sales enablement capabilities, including automated lead list generation that can identify and research 100 prospective banks and credit unions in a target region with industry analysis, tech stack identification, executive contact discovery, and personalized outreach email generation. HubSpot CRM integration enables real-time cross-referencing of prospect lists against existing pipeline data. Meeting recording and live transcription capabilities capture every client interaction, with AI-powered sales call coaching supporting multiple methodologies including Sandler, BANT, and MEDDIC. A custom Locknet sales agent provides role-specific guidance for prospect research, meeting agenda creation, and follow-up documentation. Phone-based recording enables capture of in-person client meetings through a dedicated call-in number, ensuring no client interaction goes undocumented.

Real-Time Account Intelligence and Opportunity Discovery:

Innovative connected DarcyIQ to Locknet's data warehouse, enabling real-time operational dashboards that provide technical account managers with proactive visibility into client health, ticket trends, and service utilization. Automated QBR preparation workflows aggregate ticket data, strategic initiative status, and cost analysis into presentation-ready deliverables. Scheduled agents run overnight to identify stale opportunities, unaddressed client concerns, and cross-sell possibilities across the entire account base. Account managers transitioning from Microsoft Copilot to DarcyIQ gained the ability to upload historical meeting transcripts for AI-powered opportunity analysis, surfacing revenue that was previously invisible.

Integrated Platform Architecture:

Innovative built a comprehensive integration architecture connecting DarcyIQ to Locknet's core business systems through MCP (Model Context Protocol) connections. AutoTask integration provides real-time access to client data, ticket histories, and asset inventories. Ingram Micro integration delivers actual cost pricing (not MSRP), 90-day purchase order lookback, and real-time product availability. HubSpot integration enables bidirectional data flow for pipeline management and contact synchronization. The data warehouse connection on Azure infrastructure unlocks comprehensive AutoTask datasets beyond API limitations, enabling deeper analytical capabilities for leadership reporting and business intelligence.

ARCHITECTURE OVERVIEW

The AI-powered operations platform operates as an integrated system where proposal generation, technical scoping, sales enablement, and account intelligence work together across Locknet's existing technology stack:



Service Delivery Workflow

Client conversations are captured through DarcyIQ's meeting recording—whether virtual (calendar integration) or in-person (phone dial-in). Meeting transcripts automatically generate action items and tasks, which can be assigned to specialized agents like the Locknet Solution Architect. The agent queries AutoTask for historical project data, Ingram Micro for hardware specifications and pricing, and the knowledge base for standardized task definitions, producing a complete statement of work ready for engineer review and client delivery. The LOE Builder application provides a structured interface for template-based scoping, with outputs tracked in a centralized project list for pipeline visibility.



Sales and Prospecting Workflow

Account executives use DarcyIQ's list generation to build targeted prospect lists with AI-enriched data including industry analysis, tech stack intelligence, and executive contacts. HubSpot integration cross-references prospects against existing pipeline to avoid duplication. Meeting coaching provides real-time guidance during client calls, while automated follow-up generation ensures no opportunity goes unaddressed. Scheduled agents monitor pipeline health and flag stale opportunities requiring re-engagement.



Account Management Workflow

Technical account managers access real-time dashboards powered by the AutoTask data warehouse connection, providing proactive visibility into client health metrics. QBR preparation workflows automatically aggregate quarterly ticket data, service utilization, and strategic initiative status into presentation-ready formats. Opportunity identification agents analyze meeting transcripts and ticket patterns to surface cross-sell and upsell possibilities across the entire account portfolio.

KEY RESULTS

The DarcylQ platform delivered measurable improvements across service delivery efficiency, sales effectiveness, and operational scalability:

Proposal Delivery Time Reduced from 14 Days to Under 2 Hours:

The multi-step proposal process that previously required four or more handoffs across 14 days has been compressed to a target of under 2 hours from client conversation to statement of work delivery. Sales engineers describe client needs in natural language and receive complete, executive-ready proposals with scoped tasks, labor estimates, hardware specifications, and pricing—eliminating the back-and-forth that previously consumed days of cycle time. Ben Potaracke, Locknet's executive sponsor, estimated a 50–80% reduction in proposal delivery time based on early POC results.

Technical Scoping Accuracy Matching Human Estimates:

DarcylQ's scoping tool demonstrated accuracy within the range of human engineers on initial testing, estimating 28 hours on a project where three engineers estimated 31, 23, and 25 hours. The system's continuous learning capability improves accuracy with each project submission, and estimate calibration controls allow engineers to fine-tune outputs based on project complexity and team experience. Labor hour calculations adjust appropriately based on scope changes—for example, automatically reducing hours when a client assumes installation responsibility.

Sales Team Empowered with AI-Driven Prospecting and Coaching:

Account executives gained the ability to generate targeted prospect lists of 100+ organizations with enriched data including industry analysis, tech stack identification, and executive contact discovery in minutes rather than the hours previously required for manual research. Live meeting coaching with sales methodology frameworks (Sandler, BANT, MEDDIC) provides real-time guidance during client calls. Mike Erath, a Locknet account executive, used DarcylQ to build a complete introductory meeting agenda and prospect research brief for GI Associates on his first day with the platform, identifying the COO as the key decision-maker with contextual intelligence about his tenure and decision-making authority.

Real-Time Operational Dashboards Replacing After-the-Fact Analysis:

Data warehouse integration enabled real-time operational dashboards that provide proactive visibility into client health, replacing the previous model where account

managers could only react to problems after they occurred. Peter Durnil, Locknet's operational lead, described the dashboards as enabling his team to "guide and drive their team to focus in these areas" proactively rather than reflecting on problems after the fact. Automated QBR preparation workflows eliminate hours of manual data aggregation for quarterly client reviews.

Cross-Functional Platform Adoption Across All MSP Roles:

DarcylQ expanded from initial deployment with 2 TAM users to adoption across all four operational roles—TAMs, sales engineers, account executives, and procurement—demonstrating platform value that extends beyond any single function. Unlimited licenses were approved to remove adoption barriers, and a segmented enablement plan with role-specific training sessions ensured each team could leverage capabilities relevant to their workflow. The platform's value proved to be platform-agnostic, applicable to any MSP regardless of PSA/RMM platform, with Kaseya-specific integrations adding differentiated value.

Potential to Replace Existing Tool Subscriptions:

DarcylQ is being evaluated as a replacement for Apollo (data and prospecting tool), which could yield direct cost savings on subscription fees while delivering superior prospecting capabilities. Kris Kilgard directed the sales team to evaluate DarcylQ as an Apollo replacement as part of the POC, representing potential tool consolidation and cost reduction.

Resale Revenue Opportunity Identified:

Locknet identified the potential to resell DarcylQ to their broader client base of 8,000 imaging customers across a three-state region, transforming the platform from an internal efficiency tool into a new revenue stream. With 30–35 sales representatives already calling on hospitals, clinics, schools, and other organizations, DarcylQ could become a new arrow in their quiver—shifting Locknet from a cost-center vendor to one that helps clients generate revenue, a significant competitive differentiation.

WHAT THE CUSTOMER IS SAYING

"We haven't had a program that affects all areas of the MSP like this. Even our previous POC with Pia had nothing to do with sales or account management—it was limited to some level one and level two efficiency. Darcy affects a lot of the areas of our business. We're seeing the potential for it to transform how we operate from start to finish—not just the sales piece, but the future support, service delivery, and management of these accounts. The speed at which it returns information and the accuracy of what it delivers is pretty impressive. We feel like once it's all locked in, we should be able to really turn around proposals and scopes of work on our main services and projects faster than ever before."

— *Kris Kilgard, President, Locknet Managed IT*

"I don't know who would not want this after seeing what it's capable of. We're just scratching the surface. Each week it gets better—we discover new applications we didn't plan for that save even more time. It is definitely transforming how we operate."

— *Ben Potaracke, Executive Sponsor, Locknet Managed IT*

THE BUSINESS IMPACT

Locknet's transformation shows how an AI-powered operations platform, integrated with existing MSP technology stacks, can transform service delivery while driving revenue growth. By deploying DarcylQ with AutoTask, Ingram Micro, and HubSpot integrations, Locknet compressed proposal delivery from 14 days to under 2 hours, matched human engineers' accuracy on technical scoping, empowered account executives with AI-driven prospecting and live call coaching, and gave technical account managers real-time operational intelligence that replaces reactive analysis with proactive management.

The program's impact extends beyond operational efficiency to fundamental business transformation. Scalable infrastructure supports growth without proportional headcount increases, directly reducing operational expenditure growth—a benchmark Locknet's President identified as a core priority. Real-time dashboards and automated opportunity identification surface revenue that was previously invisible across existing accounts.

The identification of a resale opportunity across Locknet's 8,000-customer imaging division shows how the platform's value extends beyond internal operations to new revenue streams. For managed service providers facing similar challenges—manual proposals, inconsistent technical scoping, account management that misses cross-sell opportunities—this deployment offers a compelling blueprint, transforming IT spend from a support function into a strategic investment.

DIFFERENT ON PURPOSE.



TRANSFORM YOUR BUSINESS WITH DATA & AI SOLUTIONS

Innovative Solutions is an AWS Premier Tier Services Partner specializing in cloud technology and digital transformation solutions. With expertise in healthcare technology, machine learning, and managed cloud services, we help organizations leverage AWS services to build scalable, secure infrastructure that drives growth and operational efficiency.

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