MSP STRATEGIC GUIDE

Land, Onboard, Manage, and Grow Clients

In this guide, we've broken up the MSP client's lifecycle into four unique phases, each accompanied by their own unique strategy.

At every phase, we'll show you exactly how to use CloudRadial's CSA platform and Unified Client Portal to help you modernize your client experience.

Table of Contents

LAND A CLIENT

ONBOARD A CLIENT

MANAGE A CLIENT

GROW A CLIENT

Land a Client with CloudRadial

Present your refined client experience to win more clients.

We'll help you modernize your sales process to leverage your newly refined client experience. We'll show you how to present CloudRadial in a way that makes your prospect meetings much more likely to turn into client onboardings.

Land a Client with CloudRadial

What if I told you that you've been doing sales with one arm tied behind your back this whole time?

But it's not your fault.

As a managed service provider (MSP), you've been inadvertently going into meetings with prospects with a fundamentally inefficient (and insufficient) sales approach. Heck, nearly the whole industry has it backward.

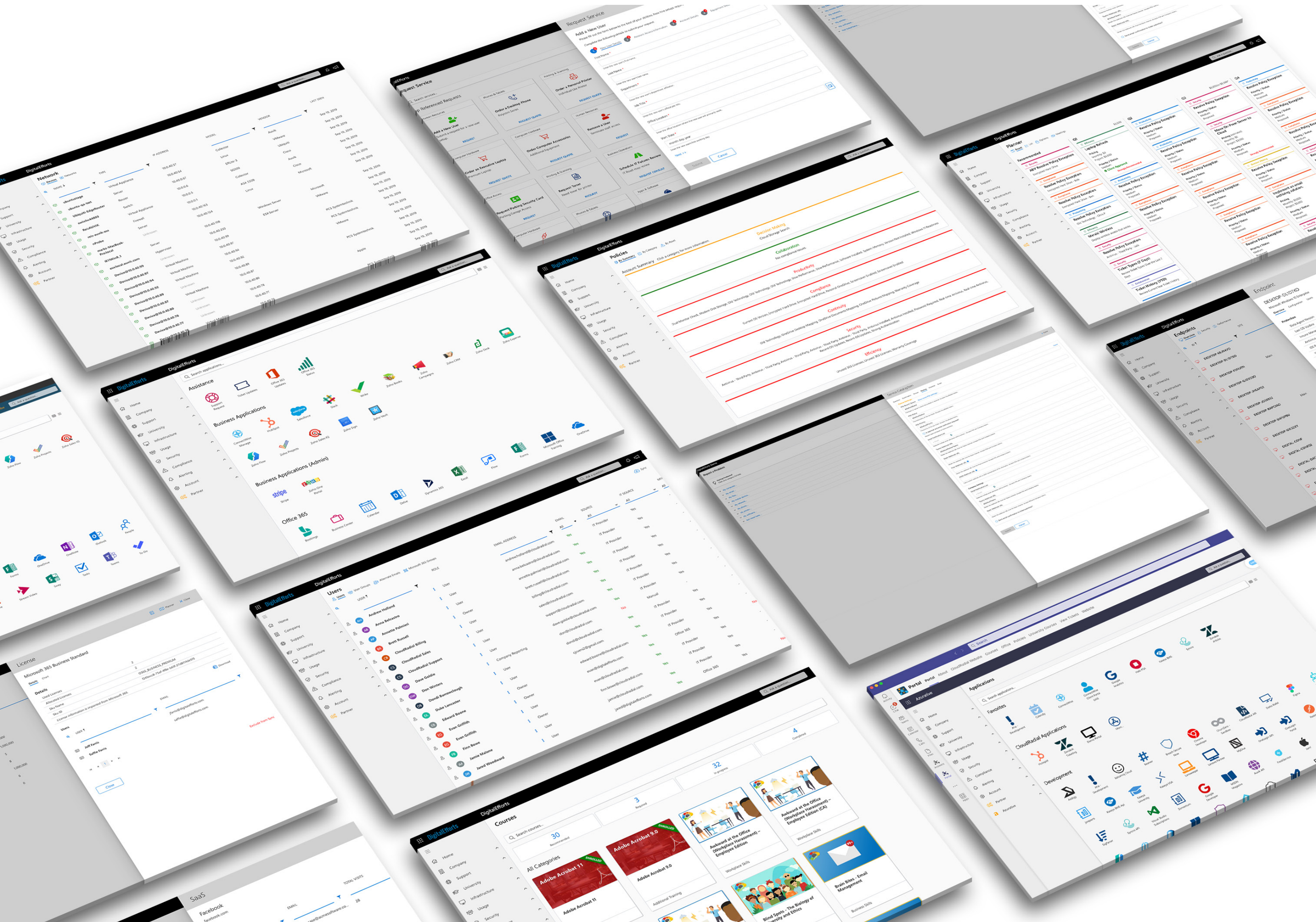
Most MSPs have been trying to convince prospects to buy services with MSP-facing and technically focused tools and reports. It's made everything solely about risk and clearing the "red" out of reports. In actuality, there's been next to nothing about business benefits that the prospect will ever witness.

But here's the good news. You've flipped it around. Now you've got the advantage.

Why? Because you've got CloudRadial on your side.

With a little bit of effort, we'll help you tweak your sales process in a way that makes your prospect meetings much more likely to turn into client onboardings.

So, keep reading on – we're about to show you how.



Stop Selling Trust, Start Selling a Solution

Before we can transform how you land a client, you need to take a good, hard look at what you've been selling. Generally speaking, the biggest issue behind the MSP sales approach is that it's been about trust.

We can boil down the sales conversation to something like this:

- **Trust that we're using the best tools**
- **Trust that we're the right people for the job**
- **Trust that we know what we're talking about**
- **Trust that we'll do a better job than the other guy**

The biggest issue with the trust approach is that anyone can make these promises.

And, since many MSPs use the same tools in their stack, there's no easy way for a prospect to know who the best choice is for a good partnership.

How can you break free of this never-ending battle to be more believable than the other guy?

Here's the simple answer: Don't lead with trust.

Instead, prove to the prospect that you're different from the very first meeting. With CloudRadial by your side, you've got a way to do that every single day, starting from that very first meeting. This guide is built to show you how.

Defining the Sales Process

To land a new client, most MSPs follow a sales process that boils down to three key phases:

- **The First Meeting**
- **The Assessment**
- **The Presentation**

Each phase has different goals, both for you and the client. We'll provide you with some strategic context and help to keep you successful along the way.

Remember:

You can also get more practical resources on how to accomplish each step by visiting **cloudradial.com**

The First Meeting

Core Objective: Build a base understanding with the prospective client.

Action Steps

1. Listen to the prospect

Most of the first meeting with a prospect is simply listening to them and adequately understanding their needs. Let the prospect tell you everything they're willing to share about their business operations, their current IT processes, their pain points, and more. Keep all of these things in mind (and preferably written down).

2. Lay down an IT foundation

Take the prospect's needs to heart. From the very first conversation with them, make sure you paint a clear picture of how you'd help drive their business growth as their IT partner.

Sell yourself as a strategic IT business partner rather than the IT handyman. Your suggestions and implemented solutions can directly benefit the client to help them make money, save money, and reduce their operational risk. As a business owner, that's a million times better than someone who just fixes issues.

But before you can deliver on that, you must set the expectation of building an IT foundation. With it, you can build a long-term game plan that shows the prospect what a tangible path to growth looks like. Without it, you're stuck in a loop of performing one-off projects or flat-rate monthly fees.

Check out the graphic below – it's our suggested hierarchy of business needs to build your foundation.

Decision Making

Power BI, Big Data, AI, Data Governance

Collaboration

Line-of-Business Applications, CRM, Teams, Phone, Conferencing

Productivity

Office 365, OneNote, OneDrive

Continuity

Assessments, Policies, Audits, Documentation

Security

Antivirus, Azure AD, SIEM

Efficiency

Mobile, Workstations, Servers, Networking, Azure

Taking care of the more simple, day-to-day stuff like workstation support builds the business's core on efficiency. Once that's stable, you can start to lay down security. Then, continuity – and so on.

As each part of the foundation becomes more stable, you can move on to the next one above, which lets you have a more significant and effective impact on business operations.

Lower levels tend to be commodities (like buying a PC from Best Buy), but things higher on the chain can be much more valuable to clients (like a cloud migration) because that's what really helps them with their business.

Imagine making an entire office more productive, versus buying a person a new laptop. The opportunity (and revenue) difference between the two is massive, to say the least.

3. Show the prospect that you can be transparent every day

Let's cut to the theory for a second and talk about what CloudRadial has to do with this.

With CloudRadial, you have the platform to show the client exactly what this foundation looks like. From the day-to-day ticketing to report archiving, you've got the means to give them a way to see all your efforts coming to realization on-demand, online, and from any device.

And let's face it – that's a must-have in the modern era, especially for IT organizations.

The other side of the coin here is that it's not just a show-and-tell platform. A shared portal is going to give the client as much say as you in the process. Turning your relationship into a transparent, actionable, and collaborative plan lets the client understand what you're doing for them (and where you're taking them) every single day.

But it is not necessary to show them everything during the first meeting.

Once you've established expectations, it's time to show them what this process looks like and how you'll potentially be working with them from now on. Let's get to work on preparing for the assessment phase.

> **"Sell yourself as a strategic IT business partner rather than the IT handyman."**

Section Recap

- **Come prepared with questions to ask the prospect about their business**
- **Leave a flyer showing your approach to the IT foundation**

The Assessment

Core Objective: Gauge the client as a prospective partner while also getting details on their environment.

Action Steps

1. Examine the prospect's current situation and determine their viability as a client

There's no faster way to lose money than to sign a contract with a company that's a bad fit.

The first few meetings with the prospect are just as important for you as they are for them – take great care to note any red flags that the prospect may show during any of your meetings with them.

These flags may include, but aren't limited to:

- Unnecessarily badmouthing their current (or ex) IT services provider
- Complaining of attempts at nickel and diming – especially when their infrastructure is outdated
- Having too great a mess of a current IT infrastructure (that you'd be on the hook for, if and when things go wrong)
- Insisting on a reactive approach and unwillingness to work towards becoming proactive

Unfortunately, it's not always easy to catch these types of clients before signing on with them.

But if you can spot troubled clients before you're tied to them, it's certainly worth weeding them out at this stage before experiencing the pain firsthand.

If they pass the first test, you'll start off by creating a company for them in CloudRadial itself with just their name. Assign a generalized feature set to them, as well as some general company groups.

The goal here is to build a mock-up so that you can help the prospect envision what it'll be like to work collaboratively with you as you work to grow their business. We'll be building out their company portal as we progress through this assessment phase.

> **"If you can spot troubled clients before you're tied to them, it's certainly worth weeding them out at this stage before experiencing the pain firsthand."**

2. Gather data from the prospective client

Now, you'll want to gather data from the client and turn it around to show them a proof of concept of how you'd improve their organization. What's the best way to do that?

One way would be to run an assessment against their organization – this can be as simple or as complex as you need. In CloudRadial, you can have this assessment set within their company as something you can present to them later on.

Aside from manual assessments, many MSPs also run discovery tools to generate reports on prospective client's environments.

If most of the current MSP tools on the market are to be believed, the approach is to show up to a prospect's place of business, run a report (or several) on their infrastructure, show it to the client, and call it a day.

When the report inevitably spits out some trouble spots – like with potential security issues, network conflicts, warranty expirations, etc. – it'll highlight them in red and give the MSP something to put back into the client's hands.

These reports can be incredibly useful but be warned, there are three massive drawbacks to them.

- **It sets your relationship with the prospective client as transactional.**
  Right off the bat, you're setting the expectation that all of the nitty-gritty aspects of IT should be "green" across the board rather than focusing on the bigger picture of business operations. The next time someone else comes along and runs an assessment against you, you'll look bad – especially if they find some red.
- **It might make you look unappealing against the current IT provider.**
  Changing IT providers can be very painful. If the reports come back with not a lot of red on them, you're instantly out of the running as a new partner. The more you rely on the "fix the red" approach, the more you're susceptible to this happening to you.
- **It makes shopping for the lowest bidder much easier.**
  The last glaring flaw from the print-and-present approach to assessing a client is that they have zero obligation to choose you. Anyone can run a report, even with the same tool. Who's to say that the client chooses to work with you? Without painting a bigger picture, you've just rattled off a laundry list of to-dos that anyone can take care of.

While these reports *do* have inherent value, they shouldn't stand on their own. To beat the drawbacks, you need to sell yourself as the vCIO that drives the strategy around them.

Try to frame the findings in a way that builds you up as an expert on the IT foundation.

If there are many issues found with the staff's endpoints, you've got core efficiency issues to resolve before you can move on to higher-level objectives (like improving overall collaboration or productivity).

Conversely, if things are stable and green in key areas, you can build a plan around the next steps regarding improving strategy, security, compliance, and more.

CloudRadial's data-gathering agent is designed to capture specific bits of information from endpoints and servers and frame them in foundational terms so that you'll have a much easier time making yourself transparent to your clients.

If possible, deploy out the agent on the client's environment and set up your policies to show them how you'll be visualizing these objectives throughout their engagement with you.

3. Gather and streamline all the assessment results

Once your core information gathering is done, you'll want to bring all of the information together in CloudRadial to really sell yourself to the client.

Before you meet with them to discuss the results, ask yourself:

- **How can you make it easy for a client to access and understand these reports?**
- **What are the biggest areas of opportunity to tackle that will change their business?**
- **Where do you start with building a plan to help them ultimately make money, save money, and reduce risk?**

Don't forget that CloudRadial doesn't have to exist in a bubble. Between the assessments and agent data, there's always room for any other reports or bits of information that you think add to the conversation.

Remember to establish yourself and your portal as a central, reliable hub of information. Forward any report to a report archive within that client's company to keep everything in one spot.

Once you've gathered all of the necessary data, you're ready to present your findings to the prospect.

Section Recap

- **Set up the prospect's company in your CloudRadial tenant**
- **Run them through a new client assessment**
- **Configure your policies in CloudRadial**
- **Deploy the CloudRadial agent**
- **Forward any other assessment tool into CloudRadial and show them the report archive function**

The Presentation

Core Objective: Bring tool reports, assessments, and your recommendations together to show the client what it looks like to work with you every single day.

Action Steps

1. Paint a picture of what it's like to work with a great IT partner

When you meet back with the prospect, it'll be time to show them the results of what you found during the assessment phase. Remember to keep everything in the context of the greater IT foundation to build that expectation of making money, saving money, and reducing risk.

The presentation itself is your own CloudRadial instance – specifically, within their individual company. Walk them through your findings from the assessment(s), policies, and any additional reports from the report archives.

Remember that you're showing them a glimpse of what it's like to work with you as a partner. Make it clear to them that these things are accessible 24/7 from any device, along with hundreds of other pieces of data, all on-demand.

And it's not just the big picture stuff for reporting, either.

This is the time to really embellish on your superior client experience for all their users. Show them how the portal will give their entire organization customizable access to a ton of features, like:

- Online ticketing and ticket history
- A service catalog for things they can order from you
- End-user training and completion tracking
- Customizable documentation
- Messaging/banners to always keep them up to date

To drive the point home and summarize the conversation, you'll turn your attention to the planner.

> **"Make it clear to them that these things are accessible 24/7 from any device."**

2. Show them a tangible plan for their growth

You need to drive home the fact that you're not just going to be capturing data for no reason. You'll also be sharing it with them as an open book.

Set the expectation from the beginning that you'll need their collaboration regularly so that you can help keep them aligned with their more important foundational goals.

The reports and assessments are your way of showing them that you're doing the work and keeping an eye on the critical stuff, but the planner is where the roadmap and suggestions get built out.

During the meeting, the discussion should end on the planner piece of CloudRadial. Here, you'll want to prepare some simplified services in the form of planner cards to visually showcase the plan of action for the prospect.

Your goal is to show the client that you're matching your services and solutions to their needs with the IT foundation in mind. It's why we have the foundational categories (Efficiency, Security, Continuity, etc.) appended to every single planner card – that helps keep every single conversation grounded in the bigger picture.

Once you paint the picture of the path to success with the planner, your meeting is complete. You've now met with the prospect, assessed their needs, stored all of the data in neat silos within CloudRadial, and given them an action plan to move with.

As long as you have at least one email address from the prospect's side, you can even give them a link to access the data you gathered within their CloudRadial company. That's a powerful leave-behind to show them all of the work you've done is as good as theirs.

Section Recap

- **Give the prospect access to the portal as a leave-behind**
- **Use the planner to set the expectation of services to implement**

A Better Sales Process

When you put it all together, you end up with something special.

You no longer have to rely on the "trust me" approach and hope that prospects believe you. With CloudRadial by your side, you can walk into a prospect's business with a plan of action in mind and a solid objective strategy to get them to grow their business.

Helping a prospect visualize the opportunities for growth and success, rather than the transactional "clear the red" approach, sets you up as a valuable vCIO partner from the very beginning.

You're also showing them you bring a lot of value to their entire team with all of your portal's other features.

The next step? **Getting ready to onboard them.**

Onboard a Client with CloudRadial

Leverage your portal to onboard clients better than ever before.

We'll walk you through the primary steps to take with your CloudRadial Unified Client Portal to standardize and organize your onboardings to be scalable – to the point where they're a feather in the cap of your client experience.

Onboard a Client with CloudRadial

Onboarding is your golden opportunity to provide a great first impression with your brand-new client.

As an MSP, the way that you onboard a new client sets the tone of the entire relationship going forward. It's a sneak peek at what they can expect from you in the future.

You did a fine job convincing a decision-maker that you were the right choice as an IT partner. And even though you may have already signed a contract/agreement at this point, the real sales challenge begins now – that is, selling your team and your overall value to the entire team on the client's side.

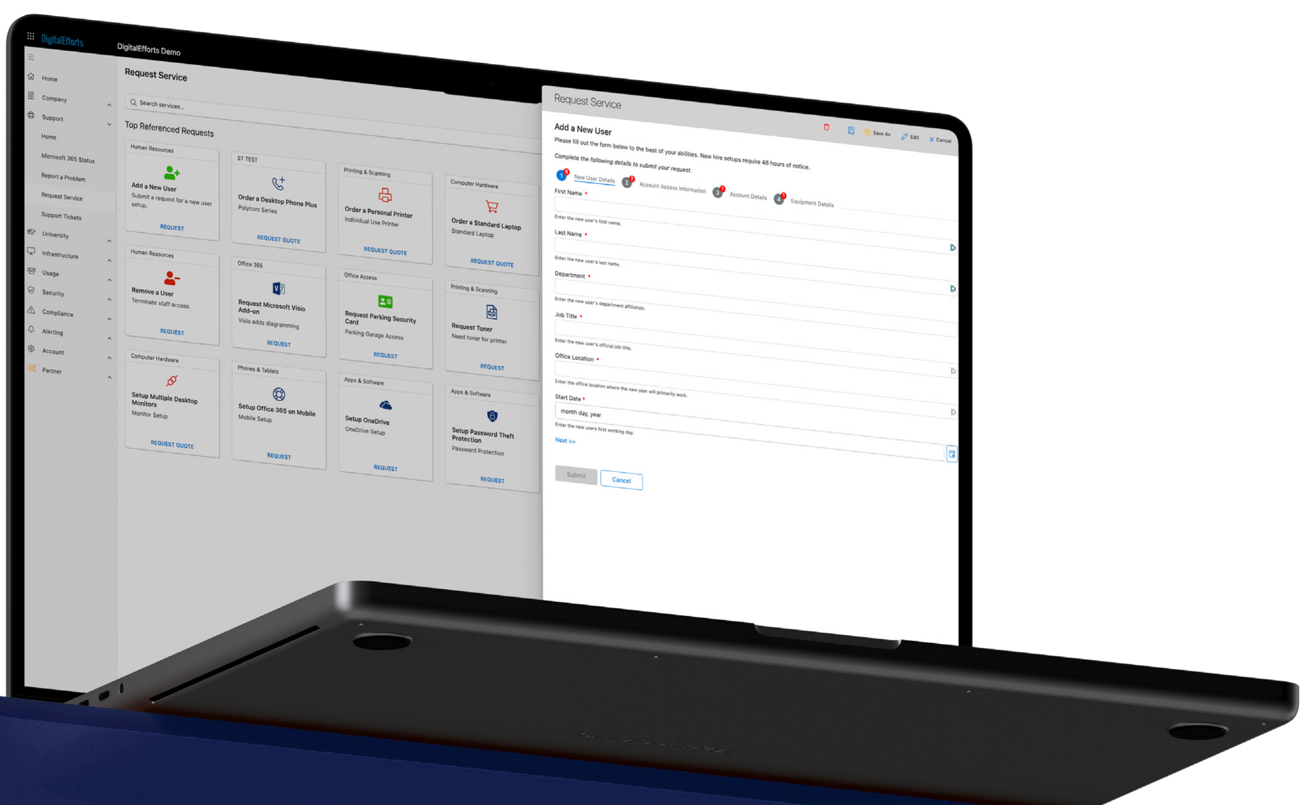
Luckily, you've already got an ace up your sleeve to make the process smoother than it's ever been.

Of course, we're talking about your CloudRadial portal.

In this guide, we'll show you how to build and focus your onboarding strategy to center around your Unified Client Portal.

We'll assist you by providing practical instructions and tips to ensure you get started on the right foot.

There's no time to waste – keep reading on.



Focusing on the Purpose of Onboarding

We can break down the MSP's onboarding process into two main objectives:

- **Gather all the technical and infrastructure data you need to use during the engagement**
- **Introduce your team and processes to the client's organization**

The first objective is the more technical of the two.

It's best accomplished using a series of tools, checklists, and processes to help make it automatic and scalable. Most MSPs already have functions to do this and are pretty darn adept at gathering what they need.

The second objective, on the other hand, is more in the realm of client experience. It's where your team ***and*** their team gain an understanding of how to best work with each other throughout the partnership.

In both objectives, your onboarding strategy should be centered around using your CloudRadial portal. You should utilize it whenever possible to store and share your reports/operating information and onboarding documentation with the client's team.

In doing so, you're already starting to make good on the promises you made when you first pitched them – things like transparency, collaboration, and accountability.

This approach unlocks a massive opportunity. Now, you're no longer focused on making the best possible impression to just the "right" people.

Instead of focusing on getting the approval of the decision-makers and key technical contacts, you now have the direct means of **earning the entire company's trust and approval.**

That's a much larger number of internal advocates that strengthen your relationship with that client.

That's enough theory - let's divide the specifics of the onboarding process into three distinct phases.

Remember:

You can also get more practical resources on how to accomplish each step by visiting **cloudradial.com**

Onboarding Phase 1: Setting Up the Company

Core Objective: Set up the client's portal with the things they really need during the onboarding.

Action Steps

1. Set a proper feature set

If you followed the previous "Land a Client" guide steps, you'll already have the client's company created within your Unified Client Portal. If you didn't do that, go ahead and create it now.

In either case, the feature set that you would have used for the initial proof of concept may be too overwhelming for the new company.

It's recommended to tailor the feature set to something smaller and more manageable for users as they acclimate to your portal – but still ensure that you leave on options that add value.

Keep in mind that there's a delicate balancing act here.

If you cut down your portal too much (for example, leaving just the ticketing portion on and cutting everything out), there's a good chance that the client will not see any inherent value in it, which hurts overall usage.

Conversely, a starter portal with every feature enabled may cause complexity overload – which also potentially hurts usage.

Clients will differ on what they're ready to work with. Be sure to gauge their immediate needs during the onboarding process and try to match a feature set based on what they would find most helpful.

As the relationship with them grows, you can always evolve their feature set to add new functions when they're ready.

> **"Try to match a feature set based on what they would find most helpful."**

1. Tailor your initial content wherever possible

Once you've got their company portal created with a solid feature set, it's a matter of continually refining their portal with relevant material to add value to it.

Remember that to win over the entire company and gain ongoing advocacy, you need to try and make the portal helpful to them and their business processes by making their daily lives easier.

During the onboarding phase, it's normal to use mostly sample content for the new client. Until you get to know them and their specific needs, you won't be able to majorly customize their content.

Pay special attention to these specific areas for opportunities to create helpful content:

- Application Menus
  Recommended Content: Office 365 or GSuite Links to work applications.
- The Knowledge Base
  Recommended Content: An "About us" article, contact info sheet, ticket submission guide, and a ticket approvals guide.

- **The University Courses and Quick Starts**

  Recommended Content: A portal navigation training course, plus any readily available company-relevant guides or handbooks in the Quick Starts.

- **The Support Tickets and Service Requests**

  Recommended Content: A generalized ticket and service request catalog.

- **The Report Archives**

  Recommended Content: Any report(s) with a client-facing value generated from CloudRadial or any other tool.

- **The Assessments**

  Recommended Content: Any onboarding assessments necessary to gather information from the client.

While the above is not an exhaustive list, it'll give you a very solid starting platform to provide the client during onboarding.

Make it clear to them from the start that you can accommodate and add customizations to sections in the portal as needed – be sure to make it a point during onboarding to ask for things like their line-of-business apps to add to the Applications section or for any how-to articles they'd like added to their portal.

It's recommended for you as the MSP to add the content on behalf of the client during onboarding.

However, remember that you can always give users access to create content for their organization, keeping the portal both collaborative and useful to them.

Section Recap

- **Set up a company with an appropriate feature set**
- **Customize app menus**
- **Customize knowledge base articles**
- **Customize university courses**
- **Customize tickets and service requests**
- **Customize report archives folders**
- **Customize assessment reports**

Onboarding Phase 2: Introducing and Encouraging Usage

Core Objective: Set and enforce usage of the portal as the go-to resource for clients.

Action Steps

1. Kick the portal off, officially

If you're reading this guide, you're serious about wanting to get the portal to be an integral part of your onboarding process. But your clients need to know that you're serious about it, too – so make sure you don't just mention it once in passing as an option to only certain people or as an add-on to your service.

If you want to see engagement across the entire organization, make sure you promote it properly.

That's especially true (and important) during the onboarding phase before the client has time to form any potentially bad habits.

Many MSPs complain and suffer from poorly trained clients who break processes all the time – things like improper ticket submission channels (like email and phone calls) or not sticking to following operational protocols (like data deletion).

Cut this behavior from the start by putting the resources they need in their portal from the get-go. Then, be sure to have an official launch that makes the portal official to the clients.

Many MSPs will host a kickoff meeting or some type of meet-and-greet onsite. A kickoff meeting is a great way to set the expectations for the organization's users and reinforce that they're just a portal away from getting their questions answered, their problems solved, and their work facilitated.

Remember the strategy behind going for a mass-appeal approach to clients – you never know where additional opportunities for work and potential projects will come from.

Other than just having the day-to-day support, opening your MSP up to the entire organization also gives you the benefit of understanding each user's needs, driving your partnership to a deeper level.

2. Facilitate and reward usage and interaction

Depending on what the new client's organization was used to doing for IT support/services, using and adopting the portal may range from easy to challenging.

If they were used to a similar IT process from previous experiences, you'll notice a quicker acceptance on the portal and a smoother onboarding process overall.

Unfortunately, that's not always the case. Old habits are hard to break.

To address low acceptance and troublesome users, make sure to set rules early to enforce and reward usage of the portal and adherence to your onboarding protocols.

Remember that while adding content relevant to their organization can make a huge difference in the usage of the portal, you can always add incentives on top of that.

> **"You never know where additional opportunities will come from"**

Some examples of incentives to consider implementing include:

- **Guaranteed SLA response times**

  Tickets originating from the portal are often tracked better and solved faster since you can control the user's information on the first pass. Educate the client on faster response times and resolution efforts on tickets that come through the portal and ensure that you prioritize these tickets over emails and phone calls.

- **Service catalog discounts**

  Consider implementing a token discount for services ordered through the portal. This teaches the client to use the portal and encourages them to look through your service catalog to order things before making a purchase themselves.

- **Course completion rewards**

  User training mutually benefits both the MSP and the organization, especially for training regarding software and security. A properly trained staff results in both parties with fewer submitted tickets and lower operational risk. Discuss collaborating with the client's decision-makers to reward users who complete training in the portal.

Section Recap

- **Send pre-launch and launch emails and build a strategy around them**
- **Develop a reward system to encourage adoption of the portal**

Onboarding Phase 3: Expanding Availability and Purpose

Core Objective: Improve the availability of your portal and reinforce its usefulness.

Action Steps

1. Expand the reach of your portal through different channels

Making the portal more available to your client is an excellent way to reduce friction with users and improve overall usage. The easier you can make it to access, the better.

During the onboarding phase, you're likely already performing a lot of work regarding standardizing policies and software deployments (such as your RMM software and several potential other agents).

Consider deploying the brandable CloudRadial Windows desktop app and Microsoft Teams app at this stage to ensure that you're covering your bases from the beginning.

The desktop app can run the portal from the user's Windows PC on their desktop and system tray (which also has unique benefits compared to the cloud app, which we'll cover later).

Alternatively (or additionally), you can also deploy your portal out as a custom Microsoft Teams application that runs the portal natively within their Teams program. With a native auto-login function, it's a game-changing way to ensure that your MSP portal is only a click or tap away on any device and operating system that supports Teams.

This is also a perfect time to deploy the data-gathering agent if you haven't already. Remember that this is different and separate from the desktop application and isn't interactive.

Since this information can be used for reporting purposes, which will come in handy later, pushing it out during this stage will proactively ensure that the data is already loaded within the portal.

> **"The easier you can make it to access, the better."**

2. Incorporating communications to the portal

You'll eventually reach a point during the onboarding phase where things settle down – you've completed assessments, customized the client's applications, made sure that the ticket catalogs are suitable and functioning, and so on.

Now, you're ready to maintain engagement with some communications efforts.

One of the biggest strategic benefits of having a centralized portal is having a captive audience for communications. If you've trained the client to use the portal, you now have a viable way to reach them for messages and updates on various things.

Let's take a service outage as an example.

With your portal, you can add a banner to the log-in screen, the home page, and even the ticket page to ensure that your customers are aware of the outage. A simple banner can help cut down on redundant tickets from the client while also keeping them better informed.

> **"Set a communication strategy that scales from individual to hundreds at once"**

If you’ve deployed the desktop application, you can also push broadcast messages out that will pop-up out of their application from the system tray. That means having the ability to instantly communicate with them whenever you need.

Aside from purely practical reasons, understanding and applying these communications tactics makes sure that your client relies on the portal more and more for your updates. In turn, that improves usage.

In one centralized location, you can now set a communication strategy that scales from individual to hundreds of clients at once.

Some MSPs prefer to do this in tandem with their initial deployment, but others prefer to do so once the portal is rolled out. Consider how you’ve communicated with clients in the past to set the precendent with how you’ll do so with the new portal.

Section Recap

- **Deploy the desktop application**
- **Deploy the Teams application**
- **Set up and deploy banner notifications**
- **Set up and experiment with broadcast notifications**

Your New Onboarding Process

This complete guide is intended to help you build a standardized, repeatable process that is flexible enough to accommodate custom content but rigid enough to run through like a checklist.

In short, the key to all of this is **scalability**.

It’s not just for how the service team or account managers handle onboarding clients, but for the entire MSP. Putting forth the effort to onboard the client in a centralized process that revolves around your portal ends up paying off exponentially.

Once the processes and strategies are established, you have a remarkably solid bedrock on building a lasting IT foundation with your clients. And a very profitable one, at that.

To see how to reap the benefits of your onboarding process, be sure to check out the next chapter.

Manage a Client with CloudRadial

Optimize and scale your client management processes.

We'll break down how you can introduce and master processes for your client management that scale infinitely. With these improved client management processes, you'll become more consistent, efficient, and professional.

Manage a Client with CloudRadial

As an MSP, you're undoubtedly used to spending a ton of time and resources trying to manage your clients as effectively and efficiently as possible.

And while you've had many tools at your disposal to standardize and control the technical side of their business, the nontechnical and client-facing side has been a completely different story.

It's most likely why you're reading this guide in the first place – to gain insights on how to better tackle client management with your CloudRadial portal.

Smart choice.

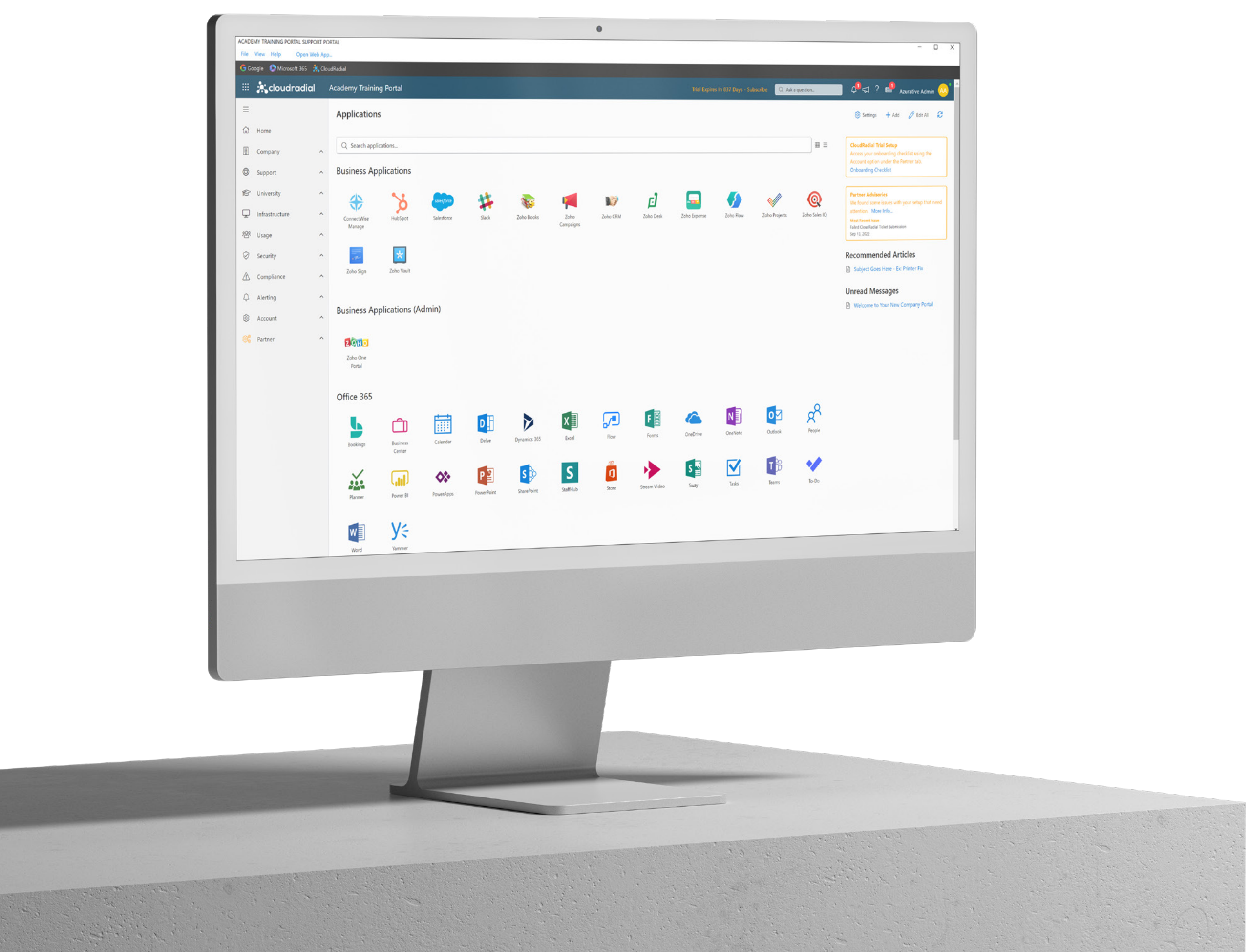
That's exactly why we made this guide. We've filled it to the brim with practical tips to help you at every step of the way.

Our goal is to help you introduce and master processes for **scalability** in how you manage your clients.

When you can make your client management process scalable, you'll see a significant quality of life improvement for your team and the client's team alike.

Admittedly, the one who ends up reaping the best benefits from following this guide is the MSP owner. When an MSP incorporates scalability as a core objective around their client management, the business becomes more consistent, efficient, and professional.

Enough said. Let's get to work.



Client Management in a Greater Context

The first thing we need to do is understand where client management fits into the customer lifecycle.

Now that you've read the previous chapters on Landing and Onboarding a client with CloudRadial, you'll know that this third step in the lifecycle ultimately leads to the growth phase.

But truthfully, many MSPs that purchase CloudRadial are coming to the table with clients that they've already landed and onboarded.

Many MSPs skip ahead to look for help on this stage specifically.

So, there's a good chance that most of your clients will technically start at this stage.

But for the sake of not creating duplicate sections of content, we're assuming that you've already set up your CloudRadial portal at a basic level with sample content (at minimum) and put it in front of at least one client.

Defining the Scope of Management

The management phase of the client lifecycle is the culmination of several important points in your relationship with the client.

- **It's where you customize the content you build for specific clients to better fit their needs**
- **It's where you fully optimize your service delivery to work better with fewer resources**
- **It's where you build, fine-tune, and scale your account management process and strategy**
- **And perhaps most importantly, it's where you make good on what you promised the client you'd deliver when you first pitched them (transparency, collaboration, useful resources, etc.)**

Let's see some practical examples of what the ongoing management of the portal looks like.

We'll break down the management phase into three distinct perspectives – the client's perspective, the MSP service desk, and the MSP account managers.

> **"Our goal is to help you introduce and master processes for scalability"**

Remember:

You can also get more practical resources on how to accomplish each step by visiting **cloudradial.com**

Ongoing Management for Clients

Core Objective: Provide a continually evolving portal that keeps the client engaged with you.

Action Steps

1. Continually evolve the Unified Client Portal and its content

A big reason why people turn to having a client portal is the engagement they get with their clients.

The more the client collaborates with the MSP and puts forth effort into the relationship, the "stickier" they become with the MSP – and the deeper the partnership evolves.

And the best place to direct their collaboration is, of course, your shared portal.

You may have started them out with generic content (such as stock tickets, service catalog items, and articles) to provide them with a functional starter portal as you got to know them.

But as your MSP gets more familiar with the clients' work processes and needs, you've got a fantastic opportunity to keep the client's users engaged with fresh, helpful, and relevant content.

Generally speaking, the best places to add content are:

- Menu applications
  Provide new links to this area as client's line-of-business apps change and evolve over time. Keep customizing it to make it an ever-useful intranet for new and existing users.
- University courses
  Add new training material for the client as you become more familiar with their organization and training needs. Offer to collaborate on content creation.
- Knowledge base articles
  Create more documentation on client-specific content processes and protocols. Make a habit of posting client-specific documentation on their portal to increase usage and value of your portal.
- Support tickets
  Build additional tickets for client-specific solutions and supported systems. Tailor the support ticket catalog to make it as relevant and straightforward as possible.

As part of a review process, make sure to take the time to speak with the clients periodically to learn about any changes to their business. Aside from being a good conversation to build rapport, it'll also give you a way to gauge and ask if they need additional content created.

You can always train key contacts within an organization to add content to the portal themselves. Clients who wish to take ownership of the portal should be encouraged and rewarded to do so – especially since that both makes the portal stickier AND lessens workload on your MSP team.

> **"You've got a fantastic opportunity to keep the client's users engaged with fresh, helpful, and relevant content."**

1. Discuss active users and license counts

MSPs face the challenge of keeping track of their client's users and license counts/allocations (particularly with Office 365). The problem often exists on the client's side as well – particularly for larger organizations.

As part of the onboarding process, you've likely gained access to a base of the client's users that you've added to your PSA tool. Ideally, you've got access to their Office 365 tenant as well.

With either (or both) sources of user information, you can use the portal as a mutual user management tool as a useful and beneficial way to add value to it for both parties.

Once you've tied in their PSA and Office 365 identifiers into their company, they will sync users from both sources. The users will be visible within both the Usage > Users area of the portal as well as the Company > Directory. With Office 365 connected, the client will see their license count under the Usage > Licenses section of the feature set.

As the relationship with the client grows, this transparent view of what you see for their organization can help both parties stay accountable for things like user provisioning, billing, cost savings, and more. Make it a habit to review and audit the user and license lists as necessary.

2. Learn and adapt to the client's preferences

During the initial build-out of their portal, you might have put the client on a limited feature set to simplify the roll-out as part of a "phased" approach. Now, it's time to revisit their current feature set.

It's recommended to periodically expand out their feature set to add new menu options over time. As their relationship with the MSP and subsequent usage grows, so should their options within the portal.

Generally speaking, you'll want to start opening up more reporting and analytical sections of the feature set to set the stage for strategic discussions down the line (like client-facing assessments, dashboards, and more). But that's not a hard and fast rule – it depends on what you prefer to show your clients.

Some clients may be happy and productive with smaller feature sets, while others may want more detail and depth of content. It simply depends on the people you're dealing with.

The client management phase is also a good time to further customize content, in addition to adding to their portal.

For example, you may want to customize things to only show specific, custom-made user groups rather than just basic users and admins. This adds a layer of depth to the portal for more granular content distribution.

In a similar vein, you may want to add more subtle forms that speak to that client's needs. Most commonly, MSPs customize onboard/offboard forms to speak to individual client needs.

At this stage, you should be breaking off from the template whenever necessary to make these finishing touch customizations for the client's portal.

Section Recap

- **Add content for the client and empower them to add their own**
- **Fine-tune the sync settings and review user counts with the client**
- **Upgrade the client to a more appropriate feature set, if need be**
- **Further customize content to fit their specific needs where necessary**

Ongoing Management for the Service Desk

Core Objective: Streamline the service desk's jobs from the outside-in.

Action Steps

1. Optimize the flow of your tickets

The CloudRadial portal is intended to be used primarily by two target audiences: The users on the client's side and the account managers on your MSP-facing side.

However, there's a "hidden" third target that should benefit from the portal – the service desk.

The service team powers ticket support, routing, and resolution. It makes sense to involve them in the conversation regarding ticket submission, especially at this phase.

To get your portal running quickly, it's generally recommended to use sample content wherever possible. The ticket catalog and service requests are no exception to this recommendation.

But during the management phase, you should have a bit more time to examine the client's needs and perfect their tickets. Saving time for the service desk is paramount – even a few seconds shaved off here and there can add up quickly to a ton of time saved for the MSP.

The four main areas to optimize within the tickets are:

- **The questions asked within a ticket**
- **The routing (boards, queues, types, subtypes, source, etc.)**
- **The approval workflows**
- **The automation processes**

Let's briefly run through each area.

2. Ask the right questions in your tickets

The questions you ask within a ticket form can make or break your support team and users alike. During the management phase, take time to comb through tickets and see if you can improve how you ask questions to resolve tickets.

The best ticket forms ask few (but very detailed) questions. Use plenty of conditional statements when you can, as well as page breaks, to make your ticket forms feel legible and easy to complete.

3. Make the most of your ticket routing

Equally important are the routing options you set for each ticket you create.

The ones you see available to you in the tickets depend on the PSA connected to your CloudRadial portal. Certain PSAs, such as Autotask and ConnectWise, support many different customizations for each ticket.

Taking the time to go back and either create more custom ticket catalogs or to "dress up" the sample one with more routing details can pay off exponentially to decrease triage and resolution times.

Plus, the more details the tickets have within the routing info, the better the client and MSP reporting – and if you can take care of it before the ticket is even submitted, why not do so?

4. Set up approvals when relevant

Remember that your CloudRadial portal can send branded ticket approval emails to users within your client's organization. During this stage of the client's management, it's a good idea to go back and determine if you need to elect specific tickets to require this approval workflow.

These workflows can save the service team (and even the sales team) a tremendous amount of time. Not only do you get to save time by not having to chase down approvers, but you also get a formal approval process that's both repeatable and automatically enforced.

And it's not just your benefit here – the client benefits from it, too. They can potentially prevent unauthorized users from ordering things and submitting tickets.

5. Build out your automation

In the portal, the goal with ticketing is always to make the service team more efficient and scalable. The options besides questions and routing are ways to help build that automation flow out to do just that.

You've got a few options to explore in this regard:

- **A confirmation message**

  Popular uses of confirmation messages include thank you messages, follow-up steps to tickets, and even suggested helpful resources to consume to try and fix the ticket before the service team gets in contact with them.

- **Checklists**

  Checklists add a series of structured to-dos to tickets as they come into the PSA. This can be massively helpful to help scale the ticket process – if tickets come with to-dos to follow, then you can make the newest person on the service team as effective as the most experienced veteran since they're following the same steps!

- **A PowerShell script**

  Using variables from the user submitting the ticket, your CloudRadial portal can also create (but not execute) a PowerShell script. This comes attached to the ticket when submitted – the theory being that a service desk person can simply take the script and run it to resolve an issue with great speed and accuracy.

These are just three examples. Additionally, each ticket can be routed to email addresses and even webhooks like Slack, Teams, and a general JSON webhook.

While these advanced automation triggers are the hardest to master, they offer the greatest potential benefits to the service team (and MSP) in the long run.

Section Recap

- **Review ticket questions and routing for clients in the Manage phase**
- **Set up and test approvals wherever necessary**

Ongoing Management for the Account Managers

Core Objective: Build a process to address the small issues before client meetings.

Action Steps

1. Keep your eyes on the prize

With all the steps covered thus far, we're fast approaching the point where the portal will run smoothly with minimal input. The clients are collaborating on the portal, the content is customized wherever necessary, and the service desk is handling the account as efficiently as possible.

But before we can launch to the final stage of the client lifecycle (growth), the account management team must first understand the bigger picture. Why should they center their strategy around the portal?

A brief look back at our first chapter on landing a client should help put things in perspective.

Back then, we discussed the overall goal of building a rock-solid IT foundation from which to build the relationship on. The idea was to center the client's experience in a collaborative way around the portal.

That way, you can lead the partnership in a transparent manner while giving your team and the client's team the clarity to focus on game-changing opportunities that evolve their business – opportunities that will make them money, save them money, and reduce their risk.

That's the end goal that we're so close to attaining. So don't lose sight of that goal!

Your team can't think big if they get bogged down in reviewing small things. You've worked hard to set up the portal to give the client the information they need when they need it.

Now, we'll build a process to address the small issues proactively so we can exclusively focus on the big picture during client meetings.

2. Developing a scalable account management process

The biggest strength in centering the account management process around the portal is the same thing we talked about at the beginning of this guide: **scalability**.

You want to build an account management process that works equally well for a one-man shop client as it does for an enterprise-level client. To do that, you need two key attributes:

Consistency and **flexibility**.

Consistency in the portal comes from the fact that all clients ultimately have the same feature set options available to them. Once an account manager builds a process to run through key areas for review, the strategy can work for any client loaded into the portal.

Flexibility in the portal comes from the fact that each client's content within their feature set can be completely different despite having the same feature set. Tickets, report archives, policies, and more can operate completely independently from one client to another.

When they come together, these two attributes make for a **scalable** process.

But what does that look like in practice?

An account manager should use the portal to review the following important areas in the feature set:

- **The ticket history of open/closed/waiting tickets.**
  Why? To look for pattern problems or outstanding issues.

- **The infrastructure of the client (endpoints, domains, servers).**
  Why? To get a quick snapshot of the client's operating environment.
- **The compliance policies.**
  Why? To spot and remediate minor trouble issues and opportunities.
- **The report archives.**
  Why? To ensure all report-producing services are working as expected and to spot and remediate trouble issues proactively.
- **The assessments.**
  Why? To objectively assess and measure client progress against quantitative questions.

Training an account manager to proactively check areas within a client's feature set helps standardize the process and make it tangible and trainable. Of course, it all depends on what you have available within your specific client's feature set – but that should start you off on the right foot.

Should the account manager find any issues in any areas, they should address them via the proper methods (like opening a ticket, letting the client know, addressing the issue there and then, etc.).

Section Recap

- **Get the account management team to build a proactive process (a checklist is a good start) for looking after each client**

Proving Your Biggest Value as a Partner

The portal should now serve as the center stage for the overall client experience, the service desk optimization, and the account manager's client management process. At this stage, the management phase of the portal goes on for the entire length of the client's business relationship.

Before you go further – take a moment to see how far you've come.

You've built and fine-tuned a slick process designed around what matters most to both the client and your team. You're within arm's reach of fully evolving to version 2.0 of your MSP.

Now, the only thing left is the most profitable and exciting phase – the growth phase.

With everything in order, you're finally ready for collaborative partner meetings to discuss higher-level business strategy and opportunity reviews. This is where you finally get the credit for what you said you'd deliver during your pitch back when your client was just a prospect.

To recap, you:

- Promised improvements in Land
- Set up the framework in Onboard
- Made it possible and delivered it in Manage

Now, you'll reap what you've sowed in Grow. Let's bring your new MSP strategy together in full.

Grow a Client with CloudRadial

Capitalize on opportunities that benefit both you and the client.

We'll steer you through the process of conducting successful business reviews to your clients at scale. We'll help you transform a traditionally painful experience into an extremely valuable meeting that both parties will look forward to seeing on the calendar.

Grow a Client with CloudRadial

It's time to talk about the cherry on top of the MSP and client relationship.

We're talking, of course, about business review meetings.

Though the core of these meetings generally revolves around the same objectives for all MSPs, their naming convention is all but standardized. You may know these as:

- Quarterly Business Reviews (QBRs)
- Technical Business Reviews (TBRs)
- Client Strategy Reviews (CSRs)
- Technical Alignment Meetings (TAMs)
- Mutual Opportunity Reviews (MORs)

And so on. You get the idea.

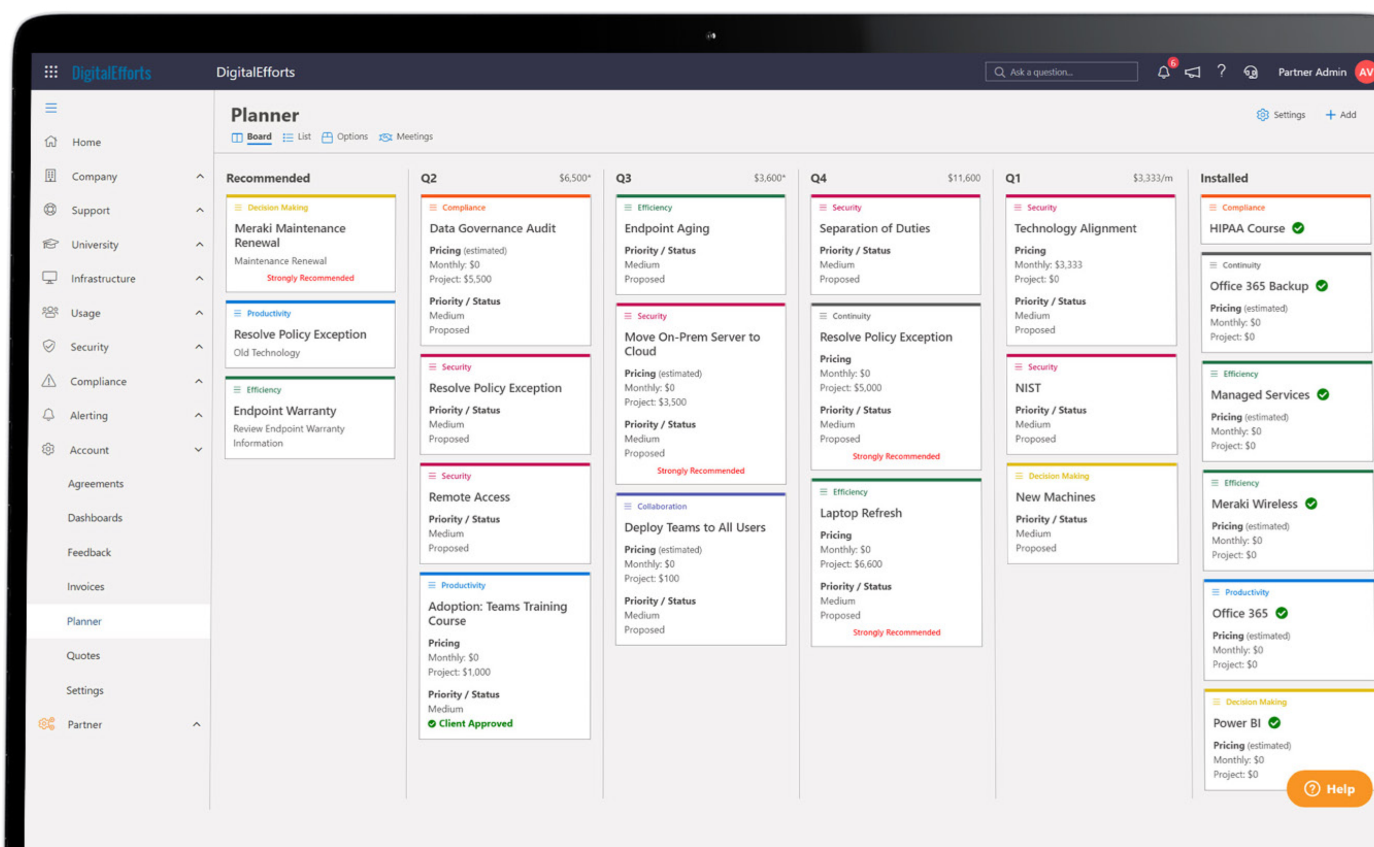
For the sake of consistency (and simplicity), we'll stick to referring to them as the ever-popular "**QBR**" in this guide. However, we're not suggesting that they need to happen on a quarterly basis specifically.

The goal of this chapter is to show you exactly how you can use CloudRadial as a platform to vastly improve your QBR experience by framing it around a new mindset, service productization strategy, and overall operation.

And it's not all theory – we've got some practical tips for you to act on, too.

We'll help you transform what has traditionally been a painful experience (for both the MSP and the client) into an extremely valuable meeting that you'll look forward to seeing on your calendar.

What are you waiting for? Go ahead and dive right in.



From the Ground Up: Lay Out the QBR's Objectives

QBRs can mean a lot of things to a lot of different people.

In our other chapters on Landing, Onboarding, and Managing clients with CloudRadial, we stuck to organizing/innovating core MSP processes. Generally speaking, these processes are established and proven.

But with QBRs, it's a bit of a different story. QBR processes are noticeably fractured across the MSP space. It's made evident by how many IT service providers struggle to find the right way to deliver them.

To help you deliver the best QBR possible, we need to look at it from the bottom up.

Let's start with why the QBR is something you even want to put effort into working on in the first place, rather than just focusing all your efforts on doing a great job with recurring service delivery.

- **The QBR is where substantial revenue opportunities can be addressed and discussed**
- **The QBR is where strategic discussions about client growth can take place**
- **And most importantly, the QBR is where the MSP builds the relationship by proving their value as both a partner and vCIO figure to the organization**

On paper, the QBR is a no-brainer.

It's a mutual opportunity meeting that should make both sides more successful. Both the MSP and the client should look forward to it every time – but that's seldom the case. Both sides feel pain from them.

The MSP feels pain in the preparation and scalability of the QBR process.

Meanwhile, the client feels pain because they often don't deliver on their promised value.

You solved the problem of preparation and scalability the moment you chose to use CloudRadial. As we'll see in a bit, we'll guide you on how to use the portal's features and your third-party tools to deliver the QBR with a killer process.

For now, we need to solve the client issue of value. QBRs often fall flat on their purpose because they're framed incorrectly to the client from the very start. Remember, **client perception is everything**.

So, let's start by reviewing how you present your services to your clients in the first place.

Remember:

You can also get more practical resources on how to accomplish each step by visiting **cloudradial.com**

Framing the QBR

Core Objective: Consolidate and reinforce the strategy around how you frame services to your clients

Action Steps

1. Reframe your service offering(s) from the client's perspective

Remember that QBR meetings will always be about the client's business and the client's objectives.

QBR meetings are NOT about pushing a "technology alignment" with your stack of services. If QBRs feel like a sales pitch to buy more stuff, the client will quickly stop seeing any value in the meetings and they will avoid them like the plague.

Instead, you need to get your QBR meetings to a point where the client completely understands, anticipates, and appreciates these discussions as strategic and high-level – and that they're all about their business, not yours.

The main objective during the QBR is to help the client understand how your efforts will align with their goals to help them make money, save money, and reduce their risk.

To do that effectively, we will need to frame your services with business objectives.

Check out this visual callback to our chapter on landing a client. Previously, we discussed using the business hierarchy of needs to form an IT foundation, which is built from the bottom up.

The logic here is straightforward. Taking care of the more simple, day-to-day stuff like workstation support builds the business's core on efficiency.

Once that's established, you can start to build layers of security. Then, continuity – and so on.

This continues until your IT efforts visibly improve how they operate their business and affect their entire decision-making process. And that's extremely powerful stuff.

Framing your services around a business hierarchy has multiple benefits, such as:

- **Making it easier for clients to understand difficult, potentially complex IT efforts**
- **Building opportunities for projects and additional work to move up the ranks**
- **Establishing a more scalable process to operate your QBRs for all types of clients**

The IT foundation process helps change how you frame your IT services from technical sales (focused on making you more money) to business drivers (focused on making your client more money).

In turn, that innately changes the client's perspective on the meeting. Now, the QBR is a valuable meeting to review mutual business opportunities and act on them as soon as they're viable.

So now, take a good, hard look at your current service offering.

Realize that you're selling so much more than just "managed services." Always think about the IT foundation and how each of your efforts fits into a more significant strategy for your clients.

2. Productize your service offerings

Now that you've got a framework of greater business objectives in mind, it's time to build a plan to achieve those objectives using your actual IT services.

In other words, this is where you'll productize your service offerings.

Turning nebulous concepts that you sell (like "managed services") into clear-cut service offerings with boundaries makes them easier to explain and utilize in strategic discussions with clients.

It helps you build a catalog of services that you can readily match with your clients' needs, removing the pain of treating each client as a special case (which is next to impossible to scale).

Productization also has benefits for your internal team. It makes it so everyone on your team has an easier time understanding what your organization sells and how they should deliver it. In turn, that makes for a more cohesive brand experience.

To productize your service offerings, focus on the following objectives:

- **Standardize and brand the names of your services**

Developing branded naming conventions for services should be a no-brainer for an MSP.

In an industry where pretty much everyone sells managed services (or managed security, managed backup, and managed whatever), there's a dire need to stand out from one another. Especially because multiple MSPs can theoretically offer the same service using the same toolset used to deliver that service.

That's why it's important to stay far, far away from service branding approaches that rely on generic terminologies (managed services) and those that use vendor names (Sophos security).

Why? Because these are simply commodities that a client can get anywhere.

Another downside is that clients can price shop to find the lowest bidder without ever knowing that they can be delivered differently from one MSP to another.

Remember that clients work with you for your expertise – not for you to re-sell them vendor solutions. Your service delivery ultimately comes down to the people who deliver the services and the expertise you've built over time to deliver those solutions.

In short, rename your solutions to something that speaks to your brand and vision as a company.

That makes them impossible to compare to others while also allowing you to focus on applying them to the client's business growth.

- **Identify gaps and opportunities in your service delivery**

The QBR process is a fantastic opportunity to put yourself in the client's shoes objectively.

Do you offer the right services to make a business successful? Is there a gap in the services that make up your service stack that a client would need to seek elsewhere? If so, does it even make sense to add these services to your stack in the first place?

Once you shift your service approach from a technical alignment to consultative and business-focused, you can get a clearer picture of what to improve upon in your service delivery.

You may find that some services you offer are too thin on benefits, while others are overstuffed with value and can be broken apart.

> **"Remember that clients work with you for your expertise, not for you to re-sell them vendor solutions."**

Lay out a theoretical path for a business and ensure that you have an idea of what it would take to grow them from start to finish. Putting your services in the context of the IT foundation can help you understand what to offer next to your clients to keep a path of growth and opportunity in front of them 24/7.

In breaking your services out like this, you can have a much more scalable set of solutions to offer.

Section Recap

- **Make a list of all the high-level services you offer your client and review it for gaps**
- **Name your service offerings to match your brand style and overall vision**

Running the QBR

Core Objective: Develop and apply a consistent QBR process centered around CloudRadial.

Action Steps

1. Build out your core planner catalog

With a more strategic and grounded framework driving your QBR process, you're ready for action.

In CloudRadial, you'll lay out the roadmap for the client using the planner, listed under Account > Planner within a client's feature set.

The planner itself is comprised of a simple card-based drag-and-drop interface that keeps things (such as services, projects, and general initiatives) organized within individual cards. Clicking on a card brings up an expanded view, which you can customize with as many details as you like.

Centering your QBR around the planner gives you several benefits, such as:

- **Giving clients a way to see all the services that you have to offer, 24/7**
- **Giving clients insight into what they're currently paying for and what they could be paying for**
- **Giving clients a visual, interactive, and nontechnical roadmap that invites collaboration**

While the planner can be used in many ways, we recommend starting with a generalized service catalog.

Your first goal should be to build out a core catalog of productized services, with each service making up an individual planner card. As you build out your catalog, ensure that your services are always framed within the context of business objectives.

As you build out your planner cards, you'll see the option to add a category to them, which will color-code them appropriately to match their business objective. That helps keep you grounded for the higher-level discussion, even if things take a turn for the technical during the QBR.

Card catalogs can be pushed out to all of your client's planners. You can always create specific planner cards that only apply to individual companies later on. But let's talk about why that's important:

With a core service catalog, your smallest and biggest clients can all play from the same deck of cards.

Well, planner cards.

And with a consistent playing field, your QBR process becomes much more scalable.

2. Reinforce your recommendations with a proactive QBR approach

You've worked hard to build out a solid strategy for your reactive approach – as in, a way to present clients with service planner cards and have them react to them.

Now, you've also got to deliver on more strategic value with a proactive approach.

That means using the data points you've put into the client's portal, along with your expertise, to present your rationale behind your technology recommendations.

After all, it's these recommendations that will ultimately take their business to the next level.

In the chapter on Managing clients with CloudRadial, we discussed how an account manager can organize and parse a client's data within a few key areas in the portal. These areas include:

- **The infrastructure information**
- **The compliance policies**
- **The report archives**
- **The assessments**
- **The dashboards**

As you review these areas in CloudRadial, you'll likely discover information that can help drive the greater QBR discussion. You can simply click on a piece of information and look for the "Planner" button. This lets you quickly add a card (and add any notes you see fit) to the planner from nearly any area.

Now, the strategic services you're recommending are legitimized by a client's real data points.

Utilizing the information derived from the client's portal in the QBR discussion proves that you're not just putting your services on their roadmap for the sake of upselling services.

Instead, you're genuinely pointing out tangible, visible barriers that potentially hold them back from making money, saving money, and reducing their risk.

Creating this hybrid approach makes for a more engaging QBR – but there's still one more thing to do.

3. What if the client says no?

Sometimes, despite your best efforts and presentations, clients will say no to your proposed plans.

In a QBR, the first thing to do after you get a "no" is to document it. In CloudRadial, it's easy – follow these steps for the specific card they declined:

- **Select the card and edit it**
- **In the card's description field, write who said no, why, and when**
- **Right-click on the card and move it to Options**

The Options tab in the planner stores cards that the client doesn't need to see on the board without outright deleting them. That's especially important for two main reasons:

- **You can use the data to figure out who your best clients are (we'll dive deeper into this in a bit)**
- **You have a clear-cut accountability trail**

Aside from business objectives and drivers, MSPs often bring up solutions and services because what they see in their client's environments is... alarming, to say the least. From massive security risks to horrendously outdated endpoints, some recommendations end up being a higher priority than others.

In these scenarios, the last thing you want is for the blame to be placed on you in the event of a failure.

Logging that your suggested remediation effort was turned down gives you a clear-cut way to point back to the portal and show the client that you did your due diligence when it was needed.

Bringing an item back to the board is as easy as right-clicking on it from the Options tab and moving it back to the board – so it's not all gloom and doom, either.

4. Have good conversations with your client

After you've presented your recommendations, you'll have another key opportunity.

Because the portal is designed to optimize QBR preparation and delivery, you'll soon find yourself with more “free” time during the meeting. Instead of cutting the meeting short or packing in more sales presentations, make time to discuss the client’s business with them.

After all, the QBR is just a productive business discussion.

Ask questions about where they are today and where they want to be tomorrow. Other than just making for good conversation, these discussions can accomplish a few different things:

- **They give you a chance to discover new projects and “hidden” initiatives**

Many times, the client’s needs won’t fit perfectly within your existing service stack. If you just stick to what’s available on the cards, you might just miss the bigger picture. Here’s an example.

In a conversation about upcoming business changes, you may find out that your client plans to hire 20 new people within the next month as part of an aggressive growth strategy. Though that may not fit within an existing core service card, it certainly merits being an item on the roadmap.

And that’s a meeting that they’re much more likely to want to fit into their schedule.

- **They help to tailor your existing plan and add flexibility to your roadmap**

Many times, the client’s needs won’t fit perfectly within your existing service stack. If you just stick to what’s available on the cards, you might just miss the bigger picture. Here’s an example.

In a conversation about upcoming business changes, you may find out that your client plans to hire 20 new people within the next month as part of an aggressive growth strategy. Though that may not fit within an existing core service card, it certainly merits being an item on the roadmap.

“There should always be the ability to change the plan on the fly.”

You can use the QBR time to collaborate with the client and build a plan to ensure their new hires are set up correctly in every respect. You’re proving to the client that you’re listening to them because you’re putting their own business initiatives on the planner alongside your IT recommendations.

The client can now see that the QBR isn’t a meeting where you sit and pitch them on services – it’s a collaboration to ensure you’re doing your utmost to support them. Sometimes, that’s with your own recommendations. Sometimes, that’s with their initiatives. Oftentimes, it’s both.

And that’s a meeting that they’re much more likely to want to fit into their schedule.

- **They help to tailor your existing plan and add flexibility to your roadmap**

In business, circumstances can change in the blink of an eye.

Planning ahead with budgets and roadmaps are all smart moves, but there should always be the ability to change the plan on the fly without causing total organizational havoc.

Discussions with the client help redefine the roadmap timelines on a set basis so you can always shift priorities when necessary. Aside from just being useful for organizational purposes, it helps set the proper expectation to the client that you’re there for their needs – it is their roadmap, after all.

- **They force you to keep your service catalog relevant and useful**

Technology changes the business landscape every single day. What’s current today could be obsolete next week – and your clients rely on your guidance to keep them competitive with their IT.

Here's a question to ask yourself:

If your services don't change over time to meet your client's evolving needs, then why would the client ever see increased value in your services?

This is one of the most important reasons to conduct QBR meetings with clients.

Keeping an ear to the ground and understanding what a client's needs are will help not only strengthen the relationship with that one client but also improve your entire service stack for all clients.

During a QBR, you may find that a client is suffering through a Microsoft Teams deployment that's seeing low adoption. That's your cue to put together a Teams training course to empower them.

Or, maybe the client is suffering from low employee productivity from mobile devices – and so a new mobile device management service and strategy will come to light as a fix.

As a strategic tool, the CloudRadial planner makes an excellent backdrop for these conversations.

As you discover initiatives and collaborate with your clients on ways to improve business operations, add new cards to the planner then and there using the Add function at the top-right. Be sure to experiment with adding different statuses (like Client Approved or In Progress) and some budgeting numbers to make the cards easier to read for the client.

Multiple discussions with multiple clients may lead you to discover a new market need for new solutions in general – which you'll want to add to your core solution stack, too.

5. Running reports and logging meeting notes

A QBR is a rich conversation that can spawn many, many initiatives on both sides of the table. As a best practice, you'll want to make sure that they stay as actionable as possible.

In CloudRadial, that will come down to two actions to complete on your end.

- **Run a report to snapshot where the client's portal was at the time of the QBR**

The portal is designed to evolve with data as the client's account grows.

You'll gradually see these changes – users and endpoints will change, policies will move from red to green, planner cards will become completed initiatives, and more.

It's a good idea to snapshot the data within a client's portal in the form of an official report. At the very least, an executive report gives you a deliverable to officially present to clients. But more importantly, it gives you a way to compare growth from one time period to the next.

You can create different report types from Partner > Settings > Report Layouts. To run a report, you'll go to your Partner > Clients area and select a client and click on the Reports option to run that report. CloudRadial will then generate the report for you, branded with your own information.

You can either run this report before the QBR as a primer for the discussion or after the QBR as a recap of the discussion points.

- **Add your meeting notes and recommendations in the planner**

So you've run your report and had your QBR conversation. The last thing to do is log your notes.

Within the planner, make sure to use the Meetings tab. This area lets you add notes regarding the entire meeting's outcomes and attach supporting documents (such as the report we just ran or any other report/file you'd like to run during your QBR).

The client can now see the results of each QBR meeting within the portal alongside the context of the planner and the report. Similar to the Options tab we discussed earlier, this area keeps both parties accountable to the decisions made during the meeting.

6. Letting the planner stand for itself

Overall, QBR meetings are a small part of your client's busy schedules.

They usually won't result in instant decisions right then and there. High-pressure planning sessions that seek immediate approval for service implementation will end up getting told "no" more often than not.

So don't push for an instant answer. Remember that you've got an ace up your sleeve.

One of the biggest passive benefits of having a planner integrated into your client portal is that the client can see it whenever they want – even well after the QBR meeting is over.

That gives your clients precious time to chew on the roadmap cards in their planner and visualize them as their own ideas. As the MSP, the best you can do is bring your strategic initiatives to them and make a business case targeted towards their unique needs.

None of this can happen if you don't collaboratively approach the QBR.

So keep it collaborative the whole way through.

Section Recap

- **Create a general set of planner cards from productized services**
- **Look for proactive opportunity discussions during the QBR**
- **Utilize the Options tab to track decline service suggestions**
- **Build and run a report to keep the data in one place**

Reviewing the QBR

Core Objective: Review QBR data for all clients to improve your MSP business operations.

Action Steps

1. Run a sales matrix report for yourself

Congratulations! You now have a scalable, repeatable way to run a QBR for your clients.

As you bring your clients to the Grow stage of their lifecycle, you'll be in a position to reap one of the most significant rewards of the relationship – visibility.

You're intended to run the QBR within each client's individual planner area. However, when you want to review ALL planners at once, you'll head over to the Partner > Planner section of the feature set.

Here, you'll get a centralized overview of the cards on every planner. That includes any card, from those coming from a pre-defined catalog to cards that were added as one-off projects during a meeting.

To keep things strategic and high-level, you'll want to focus just on your core cards.

These are the best barometers to let you know how your service delivery and stack adoption are going across your client base. From the Partner > Planner area, you'll see an option at the top right to run a Sales Matrix.

This matrix will generate a clear-cut file that visually displays your clients, your services, and the status of each. Running and reviewing a sales matrix shows you valuable information, like:

- **Which clients aren't listening to your recommendations.**
  You'll quickly see which clients opt to turn your recommendations to options. This will help you pinpoint trouble or at-risk clients and determine if you need to adjust how you present your services to them in the first place.

- **Which services are getting poor adoption.**
  You might have added a service to your solution stack, but you're now seeing that it's not getting traction. That should cause you to re-evaluate your pricing, value proposition, or messaging behind it. In other words, you can get quick visualizations of which services aren't landing right with clients.

Experiment with reviewing your QBR data on a regular basis, such as every 3-6 months. Doing so will allow you to get enough information to prove how your efforts are actively paying off for your MSP and your clients.

When you can objectively make better changes to your service stack and value delivery, you become a much better MSP for it.

Section Recap

- **Run and review a sales matrix of your client services adoption**

Your New MSP, Version 2.0

Take a good, hard look at what you've accomplished.

You've taken processes that were broken, disparate, and fuzzy and turned them into something that you can repeat and improve upon to an even greater effect.

From the very first discussion on how to prove a better partnership experience to a prospect, to delivering on it, it has been a long journey.

You're now able to:

- **Better Land a prospect by removing the trust element from the equation and proving to them that you've got what it takes to deliver transparency and collaboration every single day.**
- **Better Onboard a client with defined structures and procedures that keep their experience with you clean, easy, and flexible to their specific needs.**
- **Better Manage a client by optimizing how you deliver value to them at scale with day-to-day services and resources that get better and more helpful as the relationship grows.**
- **Better Grow your clients with a business foundation approach that moves the needle forward for your clients' business in the ways that matter the most for them.**

It's not a stretch to say that with CloudRadial, your MSP has completely upgraded for the better – and your version 2.0 is ready for its official debut.

> **Better grow your clients with a business foundation approach that moves the needle forward for your clients' business in the ways that matter the most for them.**

6060 N Central Expy Suite 500
Dallas, Texas 75206
United States

www.cloudradial.com

For information:
sales@cloudradial.com