



Why Your MSP Needs to Rethink Ticketing

Summary

Managed service providers all have a ticketing portal. Yet almost none of those MSPs have a ticketing portal that they are proud of. CloudRadial's ticketing portal is the solution MSPs didn't even know they needed. By offering robust ticketing solutions, client and staff-side transparency, as well as simple and actionable up-sale opportunities, CloudRadial is a client portal ticketing solution made to help MSPs generate more sales opportunities while creating better customer experiences.

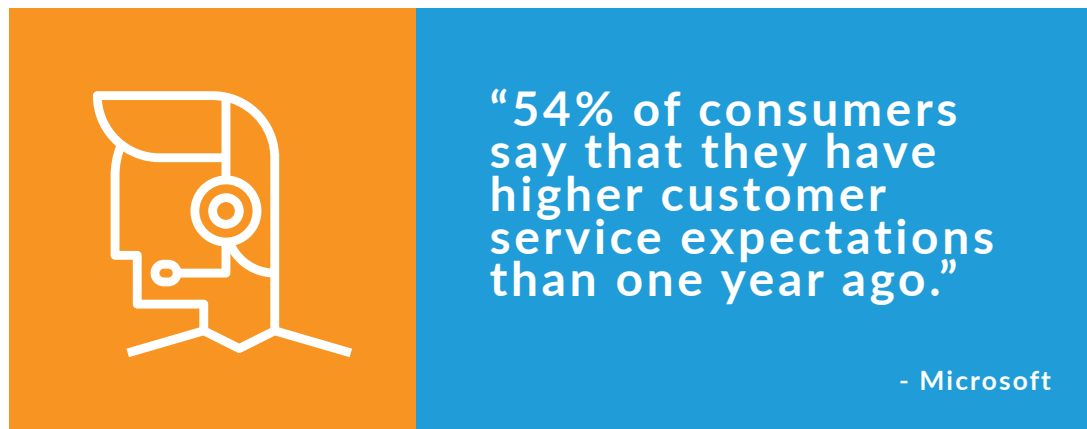
Emails and phone calls have been the standards on which most MSPs were built. And, when support involved primarily hardware and servers, it was often sufficient.

But, with Office 365 having almost 100 unique apps, devices located on premise, in the cloud, in coffee shops and homes, with security solutions involving multiple layers of protections, plus numerous interactions between systems, a simple “it’s not working” isn’t enough information to get started with.

So, one email often evolves to a multi-email exchange to even get to a starting point — much less a solution. That’s why it’s important to get as much information up front as possible in order to not only streamline support for the technical staff, but also for clients.

Handling tickets faster benefits clients more than the MSP. Tickets are what MSPs do and their systems support that process.

But for clients, every ticket interferes with their job and takes them off-task and reduces the time available to their company.



In other words, streamlining ticketing isn’t hard, but it can’t be done by email. Streamlining requires an organized method of submission that helps clients:

- **Recognize and categorize their issues**
- **Answer predefined questions that are designed to get all the information from the first report**
- **Track their ticket and be able to add other ideas and feedback to solve future problems**

Re-imagining your ticketing system from a negative “trauma center” to an Opportunity for positive account management is the key to succeeding as an MSP.

The problem with most ticketing systems

The problem is that PSAs like Autotask and ConnectWise are made to service **you**, the MSP.

Sure, they have a client portal tacked on, but that client portal isn't designed to deliver excellent service to your clients. A great ticketing system needs to be an exceptional experience for both your staff and your client.

That means it needs to do more than simply take the ticket from the client portal to the backend of your PSA. Your tickets should be able to convey precise preliminary information so the routing and handling of the ticket are correct on the first try.

The goal is less ticket-shuffling among your staff and more [single-touch resolutions](#).

Alongside that, your client portal shouldn't just be a ticket submission hub. Yes, that may be the primary drive for your clients to visit the portal at all, but you should also be able to convey relevant information regarding ticket status as well as offer other services to your clients within the same dashboard.

CloudRadial takes these features along with integration with ConnectWise and Autotask to turn your [ticketing system](#) into an efficient, client relationship building machine.

Driving efficiency from tickets with hands-free automation

Rethinking your ticketing system also means understanding that you can't settle for "just okay". You need to drive as much autonomous efficiency out of it as possible.

Within CloudRadial, you can take advantage of dynamic forms to create a series of questions for the end users. It even comes pre-loaded with default flows so you don't ever have to start from scratch. These questions allow your clients to answer basic questions about the problems they've encountered, which helps them solve their own problems.

So, instead of getting yet *another* ticket about the keyboard not working, you can ensure they've checked the batteries and restarted the system before the ticket ever reaches your staff.



With a properly developed dynamic form, you'll have much more in-depth and relevant information to resolve the ticket by the time it reaches you. This help to reduce ticket volume to free up both your and your client's time.

And, since the aim of the game is account management, it's also worth mentioning that CloudRadial serves as a robust knowledge base as well.

With the ability to add helpful documents or FAQs, you can create an easily accessible and readily browsable library of helpful information to handle the most basic of ticket subjects. A reliable troubleshooting library helps train users to solve their own questions, leaving both sides with less tickets (and more time). It's another win-win.

Building visibility that you need to prove your value

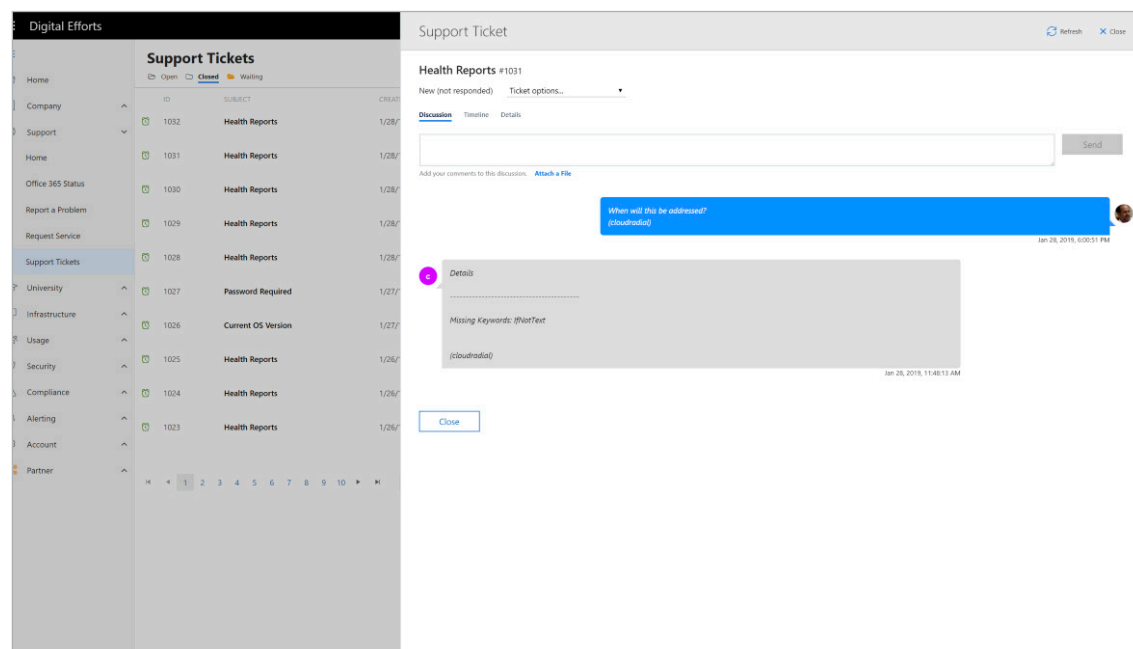
Along with a robust dynamic form builder, CloudRadial's client portal offers clear visibility to both you and your clients in multiple ways.

From a ticketing perspective, clients can see their ticket status as well as an easily searchable interface to filter through tickets. No more tickets asking for the status on other tickets. This also means fewer tickets get lost or forgotten. Clients can also openly edit tickets if there's any new information to add, making it easy for them to give updates as needed.

CloudRadial also comes with a built-in CSAT to give you a straightforward way of understanding how your service is coming across to your clients.

While most MSPs struggle to prove their value month over month, CloudRadial helps you keep all of your ticket activity front and center so that your clients will always see how much you help their business.

But here's the problem — the goal of the MSP is to **reduce tickets**. What do you do when your goal is to reduce tickets but your only perceivable value to client is how tickets are handled? It seems we have a bit of a catch 22.



This is why it's important to use a client management platform that gives clients great visibility among ALL interactions with you. From endpoint security compliance to Office 365 license reporting and automated QBRs to ticketing, the client needs a consistent, visible experience with you.

Through CloudRadial, they get exactly that.

Your value is never called into question if the information is always there for them.

Create a positive experience that drives organic sales opportunities

If a client is submitting a ticket in your client portal, it means something went wrong. While that's generally a negative experience, turning that into a positive one can be a *huge* opportunity for you.

When your client can come to your portal for reasons other than a frustrating problem, you'll know you've succeeded in making your client portal experience positive. That's the key to driving more sales.



But how do you get to that point?

The first step, as detailed above, is to use a ticketing system that does more than ticketing — while still doing ticketing well.

That means educating clients on how to use the ticketing portal with resources they can reference for transparency and documentation purposes. Once your clients trust your system, they'll begin to look beyond simple problem resolution.

That's why CloudRadial puts an intuitive service catalog directly in front of your clients that makes it easy to understand and request any additional services you offer.

With it, a simple error resolution by a technician can become an opportunity to drive them additional new solutions and services that solve their business problems for good.

The key is to present your services in a simple, consumer-friendly way – much like a modern online shopping experience.

A browsable catalog with simple information and recommendations is a great place to start.

It's also important to update clients on changes to your services. When clients are kept up to date on your newest service offerings, they are more likely to reassess their needs and consider adding new services to their stack.

They don't want to look for new services. Make it easy to buy from you.

Make your ticketing system a key part of your client experience

Your clients never asked for a ticketing portal.

All they care about less issues and a positive customer service experience.

Rethinking and evolving the ticketing experience you offer is a simple and effective step toward creating a holistic and reliable customer service experience for your brand. When you can successfully automate a positive experience in your client portal, you are able to focus more on revenue-generating efforts.

By leveraging CloudRadial, there's no excuse for your ticketing portal to feel like it's a tacked-on experience. It's time to create and control your entire customer service experience.

If you're ready to try out CloudRadial for yourself, [we offer a 14 day free trial](#). If you would like to see the ticketing portal in action, [go schedule up a free demo!](#)

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