

DRIVING EFFICIENCY:

The Role of Self-Service in Your Service Desk



Self-service is a must-have for Managed Service Providers (MSPs). Giving your customers a self-service platform where they can triage, resolve, and grow their understanding of the technology they use is the key to streamlining service desk operations.

Not only does that lead to happier customers that get what they want faster — but it also costs less on the MSP and allows them to focus on more profitable and strategic work. Sounds good, right? However, there's one small problem to deal with first...

You need a platform that empowers self-service and puts it at the forefront of the customer experience. That's where CloudRadial's Customer Service Automation (CSA) platform comes in.

Let's take a look at some of the key features that facilitate self-service and help you get the most out of the platform.

CUSTOMIZABLE FORMS

To build the foundation for a robust self-service strategy, you need to think about how your customers interact with your service desk.

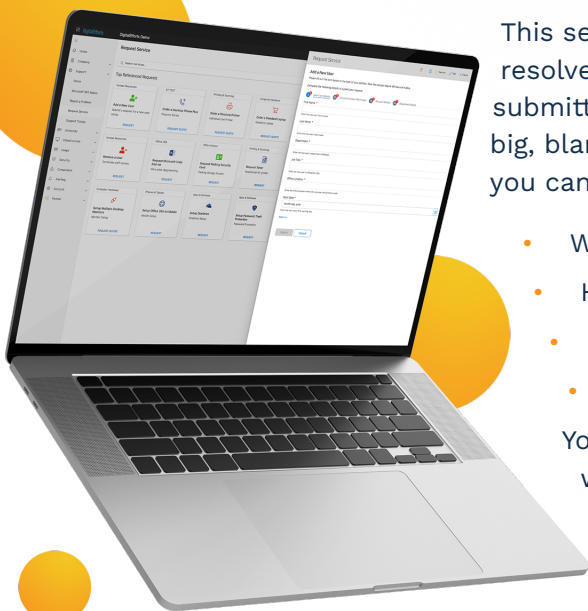
CloudRadial allows you to provide both incidents (problem reports) and orders (service requests) in a menu-style format conducive to self-service. When your customers can see all their support and ordering options, they gain the power to choose what's best for them.

Each form can easily be customized on a customer-by-customer basis or offered straight from a global template. In either case, selecting the form triggers a set of questions the customer must answer to get the required assistance they need.

This sets the stage for a cleaner data entry method to help tickets get resolved faster. In optimal use cases, it also stops tickets from ever being submitted in the first place. For example, rather than having a ticket with a big, blank text area stating, "Please tell us what's wrong with your printer," you can ask questions such as:

- What error message, if any, are you receiving?
- Have you attempted to restart your printer?
- If not, do you want to check out this article on how to do that?
- What is the printer's serial number?

You get the idea. The ideal ticket forms aren't just inputs — they're ways to weave in assistance to help resolve the ticket before it's submitted.



TICKET TRIAGE, APPROVALS, AND STATUS VISIBILITY

Aside from submitting forms, MSPs can empower their customers to take a healthy amount of control over their tickets within CloudRadial's CSA platform.

For example, MSPs can ask their customers specific questions within their forms to change the routing conditionally based on their answers. The service desk engineer can decipher whether the submitted ticket is network-related or a sales ticket using the customer's information.

Another example of self-service is the ability to route tickets for approval before reaching the MSP service desk. By defining approval workflows, customers can submit tickets to the service desk if (and only if) all prerequisites have been met. This empowers the customers to take control of their tickets without going straight to the MSP service desk engineers.

Finally, there's the simple matter of ticket status visibility. Within the CloudRadial's CSA platform, MSPs connected to a supported PSA system can view their tickets in a simplified, easy-to-read format. Users with base-level permissions can see their tickets, and users with Admin-level permissions can see tickets across the entire organization or site. That makes it easy for customers to keep track of their tickets and request input in a structured, organized way.

These features empower customers to engage with their tickets and the service desk team, helping to enhance their overall customer experience.

EDUCATION AND DOCUMENTATION

We've discussed tickets at great lengths. However, they are not the only self-service options CloudRadial offers you and your customers.

If you want to empower your customers, you need to teach them how to use their toolsets properly. Many interactions with the service desk are just fundamental misunderstandings of tools, their capabilities, and their appropriate use cases. Within CloudRadial's CSA platform, you can solve this challenge in a few different ways:

- **Knowledge base documentation:** Input documentation directly into the portal or pull it in from other sources via URL or API. Also, give your customers the power to write their own documentation in the portal for even more added value.
- **Courses and tracked training:** Build structured training courses that support text, videos, and knowledge-check quizzes. From cybersecurity to Microsoft 365 to workplace etiquette, clients can learn how to perform their job properly from the platform.
- **Application hyperlinks:** Offer a simple way for clients to reach their third-party tools and documentation with a visual bookmark menu. Make it easy for them to find and manage their list of ever-growing apps from a single centralized location.

Being able to refer your customers back to the portal for one or more of these types of education can quickly reduce the number of tickets submitted to the service desk. After all, an educated customer uses their tools more effectively, sometimes eliminating the need for support entirely.

To learn more about how CloudRadial can help you empower your customers to take charge of their IT infrastructure, why not [schedule a quick overview](#) today?

Related: Capitalizing on Self-Service in the Portal