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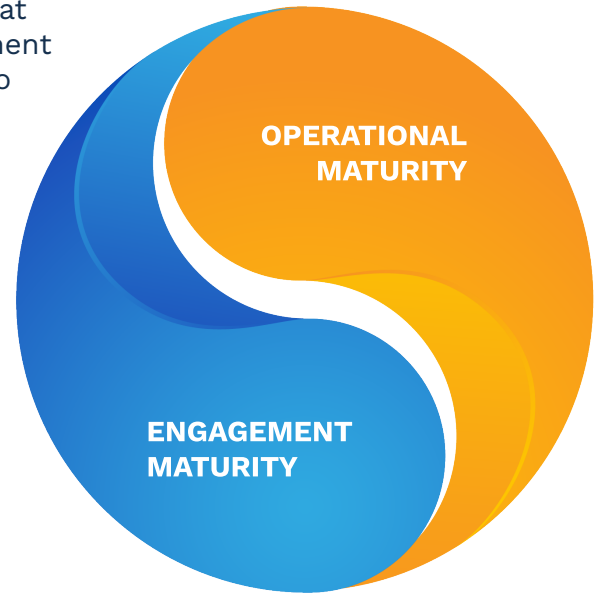
Understanding MSP Engagement Maturity

Learn why MSPs need to achieve both engagement and operational maturity to maximize client relationships so they can efficiently scale their business and increase revenue.

INTRODUCTION

Engagement maturity is about looking at your MSP and the IT services you provide from the client perspective. It is everything client. Engagement maturity complements your operational maturity to deliver the client experience that showcases the effort you put into your tech stack. Engagement is the Yin (spirit) to your PSA and tech stack's Yang (form). To be successful, you'll need both engagement maturity and operational maturity.

This whitepaper covers engagement maturity and introduces the concept of a Client Services Automation platform that integrates and delivers a client experience that obsoletes traditional QBRs and removes the chaos of client relationships so they can become collaborative and strategic. If you have clients, you'll want to understand engagement maturity and the CSA's role in addressing the challenges to get there.



WHAT IS ENGAGEMENT MATURITY?

Engagement maturity is a way to measure the progress of your client relationships and a roadmap to improve those relationships. The best way to understand engagement maturity is to look at what we appreciate about commercial relationships. The best ones are:

- **Valuable:** All relationships start here. Commercial relationships that don't bring value, don't survive very long.
- **Efficient:** The provider makes it easy to transact business and solve problems accurately and with the least amount of effort.
- **Transparent:** Data that supports the relationship is readily available, so trust is never an issue.
- **Communicative:** There is a consistent two-way flow of information to address new challenges or resolve outstanding issues.
- **Insightful:** The provider delivers advice and information that helps a client achieve their business goals faster or with less effort and cost.



The better the relationship, the more positive attributes it has. The higher the positive attributes, the higher the client engagement.



HOW IS ENGAGEMENT MATURITY MEASURED?

CloudRadial has created a client engagement maturity model that works for MSPs and internal IT service providers alike. This model measures client engagement maturity based on five levels. This model is called the IT Engagement Maturity Level™ (EML) and represents a measure of how well the relationship is working for both parties. It aligns well with the commercial relationship characteristics defined previously.

The five levels of EML are:

1. **Emerging:** Client needs are addressed, but typically in one-off ways that lack process. All client relationships start at the chaotic level until their needs are understood and appropriate processes are implemented.
2. **Structured:** Problem reports and service requests come into service teams with complete information to reduce the time it takes to resolve issues and address opportunities.
3. **Informative:** Information flows transparently to clients in ways they can understand and consume without much effort.
4. **Collaborative:** With requests and information flowing bidirectionally, IT service teams and clients are working from the same data and begin to effectively collaborate to address outstanding issues and new challenges.
5. **Strategic:** Collaboration leads to better understanding and with this understanding comes the necessary working relationship to better align IT service around business objectives built on solid technical foundations.

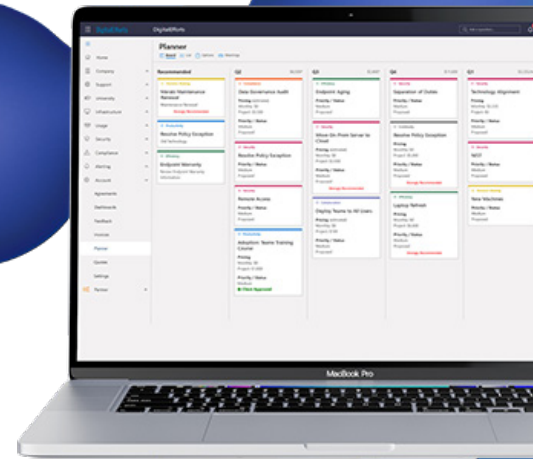
Let's explore each level in more detail.

Emerging Level: The Emerging level is where client relationships begin. Chaos arises from a lack of understanding, processes, or product alignment. Tickets come in via email or phone and are handled differently based on triage and assignment. Servicing clients with routine tasks is challenging due to the lack of structure, leading to varying responses and potential dissatisfaction.

Structured Level: Moving into the structured phase brings immediate improvements. Changes to processes and protocols create order, reducing reactive responses to client requests. Implementing structure and software in operations and client relationships improves efficiency and scalability. Processes become more service-oriented, offering a consistent catalog and focused responses, saving time on routine interactions.

Informative Level: Progressing to the informative level leads to larger changes. Establishing trust through communication, evidence-based approaches, and built-in client reporting. Creating branded products that are easy to understand demonstrates transparency and accountability, focusing on building client loyalty.

Collaborative Level: At the collaborative level, interactions with clients become



conversational and insightful. Trust is established through shared facts, leading to coordinated efforts and reliance on client feedback. Lifetime client value increases, and focus shifts to client outcomes, emphasizing client success and predictable service delivery.

Strategic Level: The strategic level is marked by mutual trust, building efficiencies together. Insights from this trust inform the development of efficiencies. Working closely with clients, anticipating their needs, and engaging in client success allows for scalable services as clients grow.

HOW DOES ENGAGEMENT MATURITY AFFECT PEOPLE, PROCESSES, AND PRODUCTS?

Improving engagement maturity involves updating people, processes, and products to better resolve client challenges. While assessing your current abilities, it's important to be as objective as possible while constantly trying to visualize the relationship from the client's perspective.

During this review, you may find that your people are highly focused on servicing your clients, but that your processes are reactive. You likely have evidence of that disconnect in your support ticket response loop. Another example is you may have consistency with delivering QBRs, but you don't have an organized, branded service catalog. This demonstrates another area that is likely causing issues regarding how well your team can upsell to existing clients.



We've taken the engagement maturity model and mapped it to an easy assessment matrix that will show you where you stand on the EML model.



This matrix give you feedback on what areas to work on and how to leverage the platform to help with your evolution to the engagement maturity level you want to be in.

WHO BENEFITS FROM IMPROVING ENGAGEMENT MATURITY?

Improving engagement maturity pays regular dividends in reduced workloads, more opportunities, higher revenues and margins, better client relationships, and improved satisfaction for both clients and IT staff. Improving EML becomes a natural part of business reviews internally and externally. Each audience sees EML success a little differently.

Service Managers

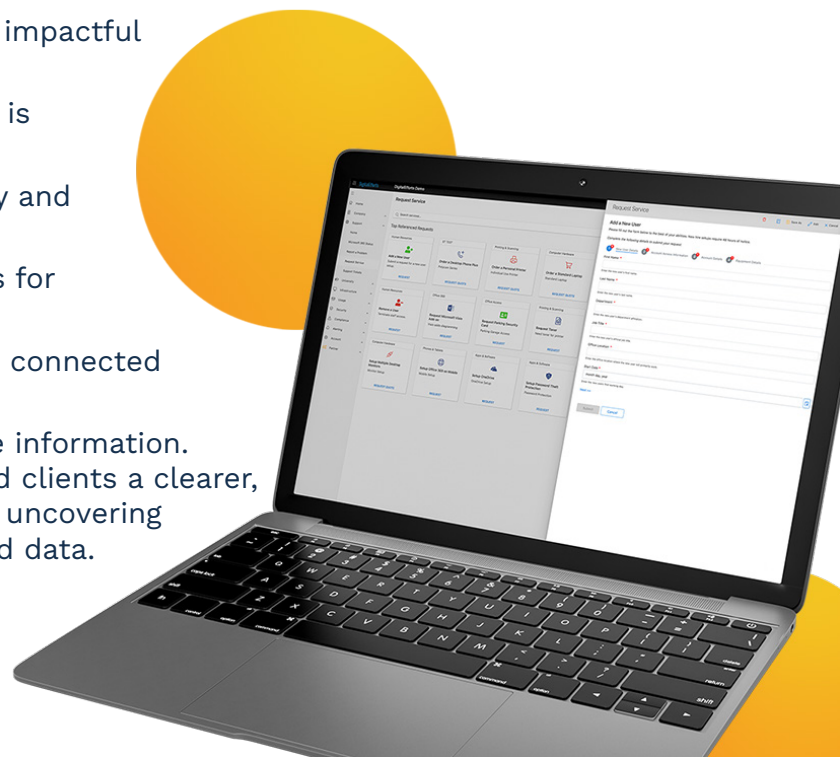
To optimize their service team, service managers aim to reduce ticket volume and ensure predictable handling. Improving EML involves:

- Optimized triage for faster issue resolution by assigning them to the right people promptly.
- Enhanced consistency through well-defined plans and processes, expediting problem resolution.
- Minimizing back-and-forth communication by gathering all required information at the outset.
- Focusing on prevention through self-service options for common issues, avoiding unnecessary tickets.
- Improving SLA compliance, enhancing client satisfaction through faster responses and closures.
- Gathering client feedback during ongoing ticket processes to ensure a positive experience. Higher EML enables service managers to achieve more with the same support staff and reduces stress by handling fewer exceptional issues.

Account Managers

Account managers desire less reactive issues to be more proactive. Higher EML benefits include:

- Reduced preparation time with easier access to information.
- Increased presentation time for discussing impactful opportunities with clients.
- Improved meeting responses as more time is focused on client needs.
- Scalability, handling more clients efficiently and consistently.
- Interchangeability with proactive processes for uniform account management.
- More frequent touchpoints, keeping clients connected to progress.
- Wider end-user insights through accessible information. Higher EML provides account managers and clients a clearer, more opportune view of the bigger picture, uncovering valuable opportunities from well-structured data.



MSP Owners

Efficiency is key for both lifestyle and growth-oriented MSP owners. By saving time on routine tasks, they can relax or focus on acquiring new clients.

Other benefits for MSP owners include:

- Profit improvements with better service and account management, resulting in improved margins.
- New opportunities from strategic client conversations, leading to new projects and revenue opportunities.
- Competitive differentiation as prospects recognize the efficiency and effectiveness of their services.
- Lower risk of churn and lawsuits due to improved communication and proactive approaches.
- Higher business valuation upon exit due to improved margins and client retention.

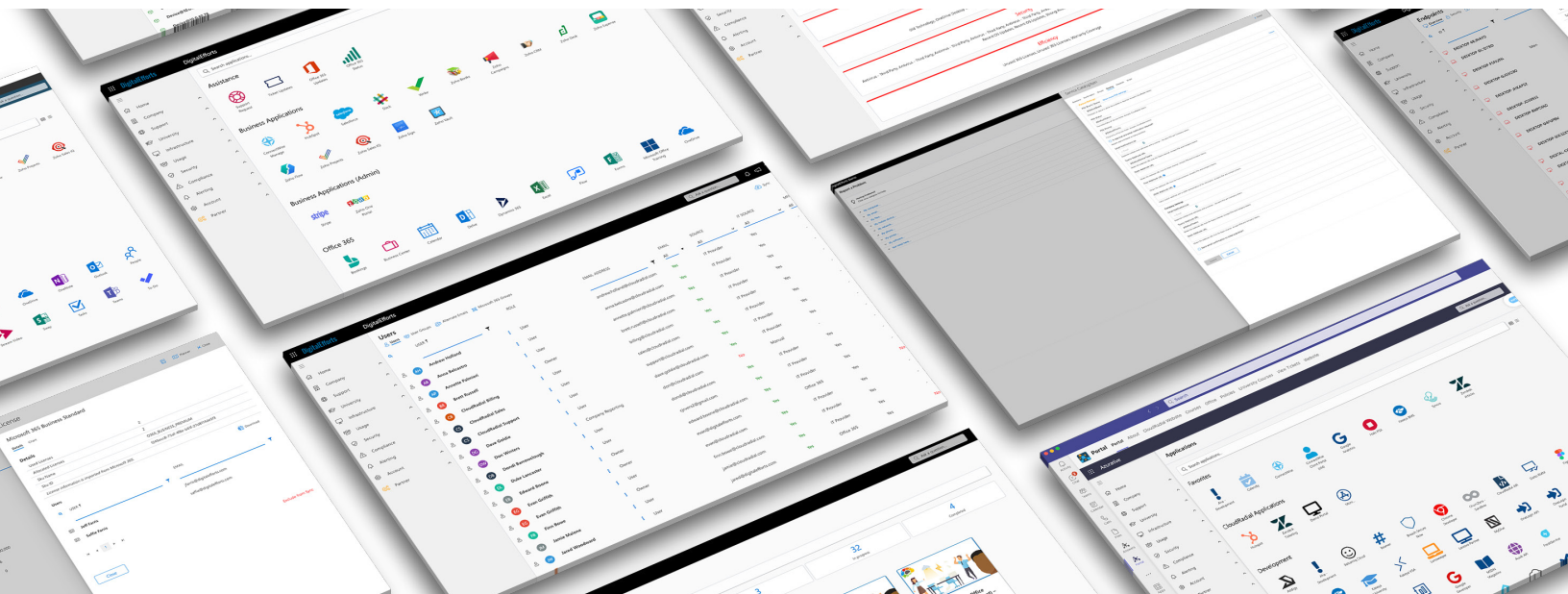
Creating a service business with a strong client focus is something any owner can take pride in.

Internal IT Teams

Focusing on EML can significantly improve internal IT support and the organization's overall quality of life. Key benefits include:

- Faster ticket resolution by using a structured approach to gather complete request information.
- Improved reporting for non-technical management, aiding understanding of daily IT efforts for compliance and security.
- Aligning IT with company goals, shifting from a cost-center to a source of opportunity and cost savings.
- Enhanced budgeting through clear roadmaps for long-term planning.

Despite their proximity, internal teams must prioritize communication and coordination to align with the rest of the organization effectively.



Clients

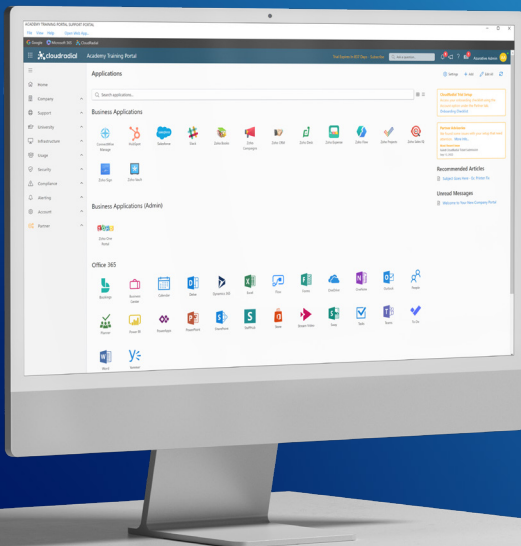
Clients don't start businesses to buy essential services like legal, tax, insurance, and IT services. However, these experts are crucial for business growth and success. To appreciate and even boast about their IT service provider, clients should:

- Witness tangible service results and accomplishments.
- Be informed about upcoming changes and improvements.
- Experience spill-over benefits in other company functions like HR and compliance. Improved EML guarantees clients feel smarter for choosing their IT service provider.

BENEFITS SUMMARY

Each step up in engagement maturity leads to progressive benefits for both clients and IT services.

Initial benefits are immediately apparent for service delivery. Successive levels begin improving account management and the strategic direction of the relationship. Even improving just one or two levels can improve your efficiency and profits.



ABOUT CLOUDRADIAL

CloudRadial is a Client Services Automation (CSA) platform that provides Managed Service Providers (MSPs) and IT Departments with a comprehensive platform that consolidates all client touchpoints into one single pane of glass.

Working to eliminate client noise through self-service features, powerful automations, seamless integrations and an intuitive client portal, CloudRadial provides optimized service delivery, automated account management, and enhanced client satisfaction, revolutionizing how MSPs and IT Departments manage their clients.