Improving Client Engagement Through CloudRadial

The service catalog is one of the most powerful tools built into CloudRadial.

With it, you're able to present your service requests to your clients in the form of a customizable (and interactive) menu. Splitting the service requests from the problem reports creates a distinct and important duality that helps your client relationships in a few different ways.

For starters, your clients can:

- **Have greater control and collaboration** within the business relationship
- **See more of what you have to offer** to help you gain more business
- **Get a positive experience** from using the portal while avoiding the pain center pitfall

When you run your service catalog effectively, you should see these three things combined for improved engagement. Let's take a look at each point in greater depth.

Giving Clients Greater Control

Many clients insist that they pay you to handle their IT, and that you should be the one handling it. It's often misinterpreted as "do whatever you want, I'm not watching". And that's just not true.

They want you, as the technology wizard, to handle the technobabble and IT issues. But they also want the ability to purchase, view, and submit their input on IT things without having to jump through hoops or ask for convoluted permissions.

Traditionally, clients have to request services from their point of contact within the MSP – usually through email, phone call, or even cheekily added into the odd support ticket.

Since there's not a great way to track these requests, they have a decent chance to result in confusion and potentially dropped balls that frustrate both parties.

But when you put the service catalog into play, you can eliminate those issues while making the client happier.

Setting up the service catalog means giving them a set of options to choose from. No more guessing if you do or don't do a specific service. If it's in the catalog, it's fair game to order – from additional Office 365 licenses to new user onboarding requests, and really anything else you deem a service.

Additionally, customizing these requests and setting up their PSA routing ensures that the requests are organized and tracked so that they never get lost.

Overall, it's great for the client. They now have some control over the relationship, and you improve service quality by being able to track these requests.

You still retain your duty as the adviser and executor of these services and if they make sense for their business, but you give them all the power to request the things they want. That's a true collaborative experience that makes you a **strategic partner** rather than just another vendor.

Showcasing Your Services Effectively

One of the biggest challenges that MSPs face is presenting their services in an organized manner. In CloudRadial, there are a few ways to do just that.

Those two primary ways are through the service catalog and the planner.

The distinction between the two is ultimately up to you to draw, but we generally recommend keeping the more contract-level things in the planner (like managed security, backup solutions, infrastructure assessments, etc). The service catalog is meant to be more day-to-day transactions, like ordering a laptop, adding a 365 license, changing access rights, etc.

Once your clients are active and using the portal, they'll be able to view your complete service catalog at any point. So, any time they go into their portal to order a service, they'll be face-to-face with your entire catalog.

In other words, no more hearing "I didn't know you guys could do that!".

The service catalog is a great way to put a non-salesy spin on selling without you needing to reach out with additional marketing resources. It's an easy win that you can get just by filling out the cards.

To ensure you're doing your utmost to attract your clients to the catalog, be sure to build out distinct categories, different colors, and interesting iconography. People are naturally curious, and it can turn a boring order into an interactive purchase experience for them to see all the things you can do.

Need a Tutorial?
Check out the ways to
Customize the service catalog HERE.

Building a Positive Experience

At CloudRadial, we prefer to be realists whenever possible. That includes taking a good, hard look at what we offer and what the challenges are – and one of the biggest is always end-user adoption.

Plenty of fantastic IT portals have failed before. Not because they were built poorly, but because they offered nothing that the client perceived to be beneficial to their day-to-day lives. The trick is to showcase the client all the things they get and emphasize the benefits they'll see.

Straight-up ticketing portals are often doomed to failure because they add complexity to the user. Where before they could simply email or call in tickets, you're now forcing them into a portal that they need to log into, find a ticket, fill out specific fields, and (sometimes) not even know if the ticket was received.

It doesn't take a genius to know that it's a recipe for adoption disaster. We commonly refer to this concept as the "pain portal". Even though it's helpful on paper, you never want to give your clients a pain portal.

And yet, realistically, there will always be some pain when transitioning to a new portal.

But to ease the transition, the service catalog (among many other features in CloudRadial) serve additional benefits to sweeten the deal for the end users. Some examples include:

- **A company intranet** to help them find links to things they need for work
- **A knowledge base** area to help them create company-specific documentation
- **A university for training courses** to help onboard their own users
- An easy way for them to **track their problem tickets and service requests** 24/7/365

In short, it's a great way to improve adoption when they get things out of the portal too.

This not only increases the rate of adoption simply due to a multi-use portal, but also removes the pain portal element. The new IT portal is a one-stop-shop for technology for everyone, not a place to go when IT frustration is at a high.

It's a subtle but powerful psychological position that makes your CloudRadial portal launch more successful.

Improving Client Engagement as a Whole

The service catalog helps you boost collaboration with your clients while also showcasing your services and turning client interaction into a more positive experience.

Combining all of these things together results in a boost in organization and client engagement which keeps your clients happy and engaged for years to come.