ScalePad

Actionable Client Communication Strategies for MSPs

Effective communication strategies that get clients saying YES.

Everything you do needs to help increase revenue for your MSP, including how you and your employees communicate with clients. But if you're better with code than conversations, this might not come easily for you.

The good thing is, you have a lot of the right information — maybe even too much. But the right information can easily get lost if it's not conveyed properly. And that can impact your bottom line.

Communicating effectively is important because it prevents lost time spent figuring out what the client really wants, improves client trust and mutual understanding, and helps you grow your business through sales.

Are clients tuning out during presentations, skimming reports and ignoring the details, or ignoring important proposals? Then it's time to re-evaluate your communication strategy.

In this guide we'll explore ways to improve client communication both in and out of the meeting room. With these tips you'll be able to fundamentally change the way you interact and learn specific tactics for improving your client communication.

> Our overall hardware sales have gone up because of the information we are now able to easily communicate to customers.
>
> **Shawn Freeman** CEO, TWT

Not sure which clients need more effective communication? Check their Digital Maturity Index **DMI** Score.

A low score can indicate a lack of understanding leading to a lack of investment.

Listen and Learn

Let's flip the script. The first thing to know about communication isn't how well you speak or write — it's how well you're listening.

Active listening doesn't mean just making eye contact and nodding along. It's taking the time to really understand what they're saying and get to the root of a problem. This will ensure you have enough clarity to move ahead with the right solution.

There are two approaches that work together: asking follow-up questions and summarizing what they've said. Try it out in your next QBR with phrases like this:

- **Can you explain that part again?**
- **So what you're telling me is that …?**
- **To summarize what you've just said… Are we on the same page?**
- **I want to clarify what you're asking… Does that sound right?**
- **To make sure I understand correctly… Are we in agreement?**
- **What does a solution look like to you?**

Actively listening and repeating information not only helps you understand your clients needs, it shows the clients that you care. In the long run, actively listening to your clients can help you spot more opportunities for improving their environment. Plus, it strengthens your relationship with your client as you build trust through mutual understanding.

> Everything we use needs to drive action. The ability to drill into ScalePad Insights equips our team with the tools to get granular with the questions we ask our clients. Insights provide the sit-rep on the client environment and enable us to approach our clients and mitigate their risks proactively.
>
> **Sean Kline** President & CEO, Turbotek

Language Counts

It’s important that you don’t need a translator between you and your clients. You want to be speaking the same language and not using words that only make sense to you or your industry.

MSP jargon might seem natural to you, but it can sound completely foreign to your clients. Some might ask for an interpretation or definition, but many clients nod along blindly. This can lead to misinterpretation and even lost opportunities when people don’t understand the importance of what you’re trying to convey.

Avoid making them look up terms they don’t know by using plain language wherever possible. If it’s unavoidable, just explain it in the moment and move along.

Instead of this	Try this
Hardware refresh	Replacing older pieces of equipment
RMM	Software that monitors how the computer is operating
TPS	Third party service, like a business who repairs laptops but isn’t the company that originally built the laptop
Endpoint	A device managed by the MSP
NOC	Network Operation Center, or mission control for the MSP

“Our clients like the ScalePad reports more than anything else we share with them because, especially for clients that don’t have any technical leadership, they see it as something spoken in plain English: how old something is, if there’s a warranty, what to budget for, or what to buy. It’s the most high-value report we have.”

Brendan Cosgrove COO, TeamLogicIT

Simplify to Amplify

You know your clients are busy. So why do so many MSPs overload clients with report after report? It's mostly because they have access to so much data that they think their clients will want to see all of it, or they simply don't know how to communicate the data they collect in an effective way. **Just because you collect every data point possible doesn't mean you need to share it all.** Communicating this way is both time consuming and a recipe for analysis paralysis.

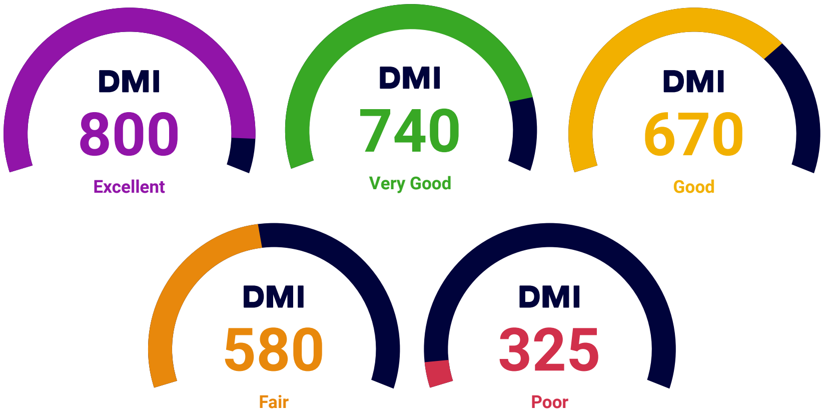
Next time, take the opposite approach and aim to share insights that highlight the wins, risks, and upcoming opportunities. Think of it as a cheat-sheet rather than the entire textbook. This creates clarity and takes away confusion.

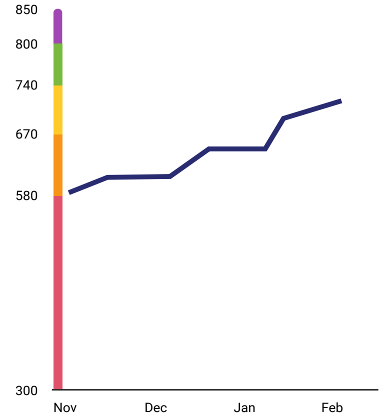
Simplifying the content you put into a QBR will also amplify what you put in. With less to look at, actionable items come to the forefront rather than being lost among the data. The result is clients know exactly what they need to do next and why.

Want to take simplification one step further? Implement templates, like the Initiatives templates from ScalePad. They make it easy for you to present only the information that's critical for clients to make decisions.

> The Initiatives templates save us so much time. They have the background, problem, and reason clients need to change. All we do is add in the budget and send them on.
>
> **Carrie Green** Operations Manager, Alt-Tech Inc

> The ScalePad reports show our value to our clients. They prove we are doing our jobs in such a simple way.
>
> **Chris Leiker** President, More Power Technology Group





Visualize It

Communication isn't just words, it's visual too. You don't need to be a designer to see how graphs and charts make it easier to understand complex data.

Adding color to your visuals will help convey meaning as well. Red, amber and green are universal indicators of bad, okay and good. That's why ScalePad uses them in our reports, Insights and DMI Score.

Just by visualizing the data your clients will need less explanation. If you haven't yet, try implementing visuals in your next QBR. Rather than showing the last 6 months of ticket closing data, you can simply show a line graph. If it's going down, make the line green to show that it's a good thing. If it's trending up, use red to show something isn't right.

ScalePad's automated reports integrate visuals and colors on the first page to create a quick overview of your client's environment. As you get into the details, the color scheme is carried through. This automatically makes it easy to see exactly what needs attention.

> ScalePad Reports' color-coded system makes communicating risk simple. Clients know assets in red or yellow are in need of attention, so it's as simple as asking them how to proceed.
>
> **Darrin LebLanc** Client Engagement Manager, PEI - HQ

Follow Up

Quarterly or monthly meetings deserve follow-ups. Send a quick email to your client within a few hours to recap the meeting and anything you've agreed on. This provides clarity, confirmation, and opens the door to continued communication.

What you include will depend on the meeting, but you might want to consider:

- ❒ Any feedback they provided
- ❒ What goals you've set
- ❒ The timelines established
- ❒ If they approved or denied a proposal
- ❒ Next steps for your MSP and for the client
- ❒ A copy of any reports, proposals or presentations you shared

Follow-ups are also important for risk management. If you've shared critical proposals but the client hasn't approved them, you should include a Risk Acknowledgement form. If something goes wrong, it's good to have proof that it could have been avoided if they listened to your proposal.

> There is a huge amount of value found through ad-hoc conversations with clients. Open and constant lines of communication can provide so much insight for quoting, project planning, budget planning and how to drive clients forward.
>
> **Stacy Kulhanek** Operations Manager, NetSource One

Everything comes down to communication. Whether it's listening to a client's needs as they're onboarded, or providing continual service to existing clients.

Remember: less is more. Less jargon, more listening. Less complex data, more simple visuals.

The result of all this takes time to see, but consistent clear communication makes a difference. Since implementing the simplified, visual-based reports from ScalePad, our partners have had better QBRs, increased warranty sales, and improved customer relationships.

Combine that with active listening, jargon-free language, and consistent follow-ups and you'll be well on your way to effectively communicating with your clients.

> Visualizing critical issues communicates risks much better than technical conversations. ScalePad Reports are so simple that our clients understand where issues are in their environment and drives them to take action.
>
> **Darrin LebLanc** Client Engagement Manager, PEI - HQ

ScalePad strengthens the connection between Managed Service Providers (MSPs) and their clients. Trusted by more than 10,000 partners worldwide, ScalePad's innovative asset management and backup monitoring apps are used by over 60% of the MSP 501 to surface hidden risks and opportunities. These applications deliver actionable insights that lead to better service delivery through automated data collection and analysis.

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