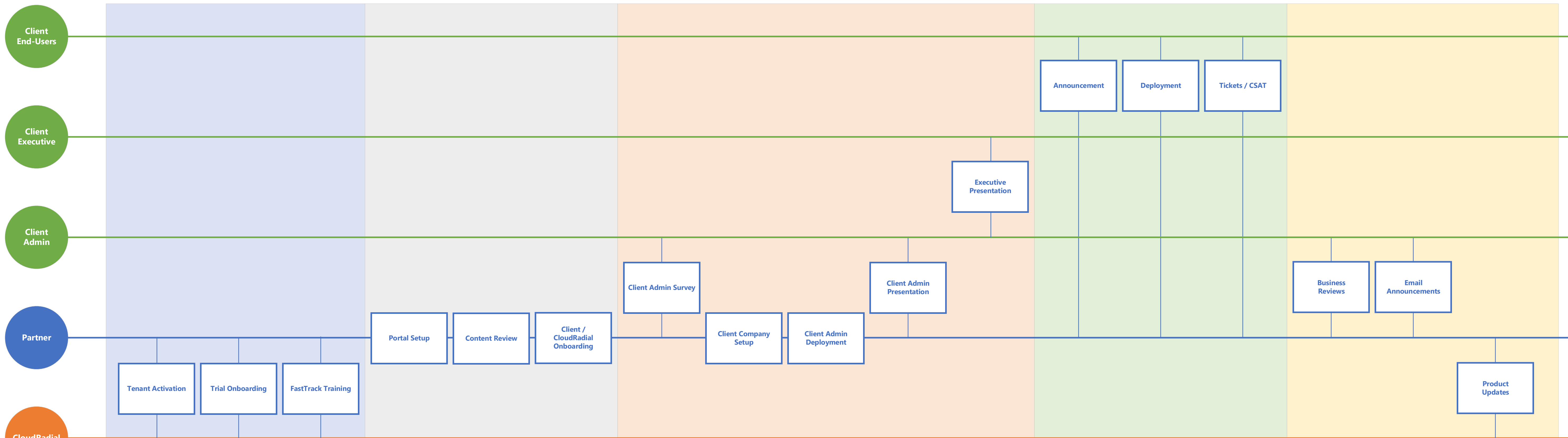


CloudRadial Deployment Blueprint



Deployment Phases

1. CloudRadial Partner Onboarding

Goal:

CloudRadial Partner Proof of Concept

Setup

- Does it easily integrate with our existing systems?
- Can it help us keep our PSA in sync with Office 365?
- Does it allow us to grow into the product to control our monthly cost?
- Does it let us reduce the number of tool subscriptions we need to deliver information to our clients?

Service

- Can it help streamline ticketing?
- Can it let me customize ticket forms by client and groups of clients? By company role?
- Users are able to answer more questions through provided support and training resources?

Reporting

- Does it help our clients understand what we do for them?
- Does it help provide transparency to our clients?
- Does it help clients better understand their IT infrastructure?
- Does it streamline email reporting to clients?

Sales

- Does this help us showcase our service catalog?
- Does it let us focus on opportunities to help our clients make money, save money and reduce risk?
- Does it help us deliver our brand identity to everyone at our client organizations?

QBRs

- Does it consolidate a number of client touch points in a single dashboard?
- Does it streamline the preparation of our QBRs?
- Does it let us provide QBRs for more clients?

2. CloudRadial Portal Setup

Goal:

Easily Customizable and Scalable Portal

Settings Configured

- Feature sets setup and approved? <https://radials.io/FeatureSets>
- Company groups setup and approved? <https://radials.io/CompanyGroups>
- Custom domain provisioned? <https://radials.io/CustomDomains>

Content Created

- KB articles content approved? <https://radials.io/KB-Article>
- Courses content approved? <https://radials.io/Courses>
- QuickStarts content approved? <https://radials.io/QuickStarts>
- Policy content approved? <https://radials.io/Policies>
- Service content approved? <https://radials.io/ServiceContent>
- Planner item approved? <https://radials.io/PlannerItems>

Agents Deployed

- Data agents deployed? <https://radials.io/AgentDeployment>
- Desktop application deployed? <https://radials.io/DesktopApplication>
- Desktop tray app? <https://radials.io/DesktopTrayApp>

3. CloudRadial Portal Client Buy-In

Goal:

Client Admins & Executives Anticipate Benefits

Client Admin Buy-In

- Client admin(s) asked for opinion and feedback pre-portal presentation? <https://radials.io/DeploymentForm>
- Client admin(s) presented with portal overview document for company management? <https://radials.io/PortalOverview>
- Client admin(s) presented with guide on how to submit tickets and service requests? <https://radials.io/SubmittingTickets>
- Client admin(s) presented with guide on approval workflows? <https://radials.io/ApprovalWorkflow>

Company Provisioned

- Company groups added? <https://radials.io/CompanyGroups>
- Feature Set identified? <https://radials.io/FeatureSets>
- Custom service requests prepared? Onboarding? Offboarding? <https://radials.io/ServiceContent>
- Custom menu items and other content setup? <https://radials.io/MenuItems>
- Administrative users and limited-access users configured? <https://radials.io/LimitedAdmins>

Executive Buy-In

- Company admins and executives understand the portal benefits? <https://radials.io/NewPortalExplainer>
- Presentation presented to company management with deployment schedule? <https://radials.io/DeploymentPresentation>

4. CloudRadial Portal Launch

Goal:

End Users & Admins Engage & Benefit from Portal

Company Content

- Admin and executive content additions created? <https://radials.io/ContentAdditions>

Launch

- Distribution email list created? <https://radials.io/EmailLists>
- Pre-launch email sent to end-users? <https://radials.io/PreLaunchEmail>
- Agent and application deployed to end-users? <https://radials.io/DesktopTrayApp>
- Official launch email sent to everyone? <https://radials.io/LaunchEmail>

Post-Launch

- Portal URL added to outbound tickets? <https://radials.io/PostLaunchBestPractices>
- Feedback template added to outbound emails? <https://radials.io/PostLaunchBestPractices>
- Content adjusted as needed for new items? <https://radials.io/ContentAdditions>
- Optional – Survey users for portal feedback? <https://radials.io/UserFeedbackForm>

Helpful Tools

- Email designer <https://topol.io/>
- Email sending <https://mailchimp.com/>
- Video recording/voiceover software <https://www.techsmith.com/video-editor.html>
- Free HD stock photography <https://unsplash.com/>

5. CloudRadial Portal Benefits

Goal:

Portal Becomes Part of Client Management

Client Reporting

- Client admins and executives kept more up to date with their IT? <https://radials.io/Visibility>

Improved Engagement

- Orders come through the service catalog? <https://radials.io/Engagement>

Improved Service

- Tickets come in with more complete information? <https://radials.io/Ticketing>

Improved QBRs

- Less preparation time before client review meetings? <https://radials.io/BusinessReviews>