

The 60-Minute MSP QBR Agenda

+ the prep checklist that gets you there in 45 minutes

The agenda

1. **Open + agenda check (2 min)** — “Anything you want to make sure we cover?”
2. **Executive summary (5 min)** — wins · watch items · decisions needed. One slide, business language.
3. **IT health scorecard (8 min)** — one overall score, six category bars, quarter-over-quarter trend.
4. **Support review (10 min)** — ticket volume trend, response/SLA, what drove tickets and what you're eliminating.
5. **Security, backup & lifecycle (10 min)** — status tiles, the gaps, the fixes.
6. **Risks & recommendations (15 min)** — top risks by likelihood × impact; one priced proposal per risk. Ask for decisions.
7. **Roadmap, budget & goals (8 min)** — next 12 months, per-quarter spend, their business goals feeding the plan.
8. **Next steps (2 min)** — owners + dates, and book the next QBR before you leave the room.

The three rules: lead with wins · pair every red number with a cause and a fix · one decision ask at a time, then silence.

The prep checklist

Two weeks before:

- Book the meeting — decision-maker in the room (“there are spending decisions on the agenda”)
- Start a wins list — projects, prevented incidents, anything invisible on invoices

Two days before (≈ 45 minutes):

- Export the quarter’s tickets from your PSA; compute volume, response, resolution, SLA by priority
- Score the environment: security, backup/DR, patching, lifecycle, network, support experience
- Write the top 5 risks with likelihood × impact, an owner, a fix, and a price
- Draft next-12-months roadmap with per-quarter costs
- Build the deck: exec summary → score → support → gaps → proposals → roadmap → next steps

Day of:

- Rehearse the executive summary once, out loud
- Know your three decision asks and their prices

Within 24 hours:

- Send the recap email: score, decisions made, “reply approved to confirm”, next QBR invite

Want the whole system? The MSP QBR Kit includes the 20-slide QBR deck template, the auto-scoring IT Health Scorecard workbook, the QBR Metrics Analyzer (drop in a PSA ticket CSV, get QBR-ready metrics — runs entirely in your browser), and the full playbook with talk tracks and objection handling. One-time purchase, use on every client forever. → everydayaiden.gumroad.com//icnls