ScalePad **Lifecycle Manager**

MSP QBR Sample Agenda

Here's your roadmap for clear, engaging conversations that move your clients forward.

☑️ **Here's a guide to terms used in this agenda.**

Client-Focused Conversation

Start with a conversation that gives your client space to share about their business — the ups and downs and plans for the future. These conversations nurture trust and build rapport. Deeper client insight also makes it easier to recommend thoughtful solutions based on their needs.

Remember, this isn't a time to replay the details of a recent ticket or delve into specific services. The QBR is a time to show your value and confirm your delivery against the client contract.

Asset Review

Take the time to help your client visualize their technology's health status. Color-coded hardware reports that display data points relevant to the client's goals and concerns can quickly bridge the communication gap and simplify complex technical concepts. With all the data in one concise report, you have an accessible conversation starter for strategic planning.

With **Lifecycle Manager**, it's easy to generate engaging, data-driven assets, such as **Scorecards**, to highlight IT risks and show opportunities in your clients' IT environments. Features like **Scorecards** and **Insights** in **Lifecycle Manager** quickly bridge the communication gap and simplify complex technical concepts.

Industry Trends

Here's your opportunity to flex your expertise by sharing updates on improvements and innovation in your space.

Don't shove this part of the meeting aside; this is where you can introduce your client to new solutions or services. Demonstrating your knowledge and commitment to leading-edge service helps build trust and prepares your clients for changes or additions to their technology plans.

"Big Picture" Discussion

Have you noticed that this agenda doesn't include "breaking the hard news" to your client about outdated infrastructure or other critical, high-cost issues? That's because, with the "big picture" as part of your agenda, you won't need to have those anymore.

Productivity and risk factors in a client's technology plan might be obvious to you but undecipherable to your non-technical client. That's where having dynamic and unbiased reporting makes all the difference for QBRs that resonate. With a "big picture" view of their digital maturity, clients are empowered to be part of the conversation.

By presenting an overview of IT health in an easy-to-understand way, you can invite your client into shared accountability for their technology plan. It also enables your client to budget for future IT investments and feel secure for the future with you as their strategic partner. And best of all, with the **DMI™ score** feature in **Lifecycle Manager**, you can achieve all of this in just a few clicks.

Lifecycle Manager
Lifecycle Manager is a client engagement platform built to help MSPs automate data collection, proactively manage and report on client technology plans, and prepare for QBRs in seconds with visual, easy-to-understand reporting formats.

DMI™
The Digital Maturity Index (DMI™) is a Lifecycle Manager feature that rates your client's environment like you would see a credit score. It provides a visual and accessible format for describing challenges and wins to non-technical clients.

Insights
Insights is a Lifecycle Manager feature that lets you see critical opportunities and risks for each client at a glance, allowing you to quickly identify which actions to take to reduce downtime and enhance the service experience.

Scorecards
MSPs use the Scorecards feature in Lifecycle Manager to quickly generate visualizations of their clients' IT environment strengths and weaknesses. It enables MSPs to work with clients to see and understand risks and improvement opportunities.

Why is a QBR agenda important?

You could improvise your way through QBRs without an agenda, but you'd be missing out.

Here's why:

QBRs are a valuable opportunity to elevate the client experience and become the strategic leader you were meant to be. Take advantage of tools and guidance built to help your MSP thrive, like the MSP QBR Sample Agenda above.

It helps you show your value. An agenda provides guardrails to ensure your meeting stays on track and addresses the most important outcomes: assurance that you're delivering against your contract and that your clients feel the value of your work.

It provides comfort and security to your clients by giving them what to expect. An agenda is bound by a timeframe, and by sharing it with your clients, you can provide confidence that you will address specific topics within the agreed-upon time.

It opens the conversation to strategic thinking and building trust. You can facilitate room for dialogue to learn about your client's challenges and goals for the future. It's easier to recommend proactive solutions when you have already established yourself as a strategic partner to your clients, and share in the drive for their success.

Quick-View Sample Agenda

Prepare your clients for what to expect. Use this Meeting Agenda for your next QBR presentation!

Time	
8:50	
9 am	**Open Discussion (10 minutes)** How's business? Have there been any notable changes? Let's get caught up so we can provide the most timely and personalized services for your needs.
9:10	**Asset Review (20 minutes)** Looking at the obstacles, areas of concern, and wins of your technology environment.
9:20	
9:30	**Industry Trends (10 minutes)** An overview of shifts in the IT industry, where we'll highlight changes that could impact your services.
9:40	**"Big Picture" Chat (20 minutes)** An assessment of productivity and risk factors for your technology environment, followed by a discussion of proactive ways to address those together.
9:50	
10 am	
10:10	

Want to automate how you collect and present visualized QBR data to your clients?

Book a personalized Lifecycle Manager demo to see how it works.