|  |  |  |
| --- | --- | --- |
| A close up of a logo  Description automatically generated |  | A picture containing shirt  Description automatically generated |

Agenda

|  |  |
| --- | --- |
| Client name:  Location | vCIO name:  Date: |

Attendees:

|  |  |
| --- | --- |
| • | • |
| • | • |
| • | • |

|  |  |
| --- | --- |
| Time | Description |
| 5 min | Check-in |
| 10 min | Relevant action items  • Action items from last QBR  -  -  • Recent updates  -  - |
| 5 min | Client updates  • What organization changes are expected over the next 18 months?  • What industry changes are expected?  • Company growth or shrinking expected?   * Adding employees * Adding or changing locations * New technologies   • Environment at a glance   * Asset report (What have we recently put in place and need to inventory?) * Budget report * User report (Optional) * Office 365 overview review * Documentation review (Are there new policies/procedures we need to standardize and document?) |
| 15 min | Review of Exposure and Risk  • To Dos:   * Standards & best practices Alignment projects (latest assessment) * Security upgrades * Present/Review quotes (Review here or with budgets)   • Issues   * #1 * #2 * #3 |
| 5 min | Wrap-up and Closure  • Document new actions items (to become tickets)  • Summarize customer deliverables |

# Internal Preparation Worksheet:

Begin this 10-15 business days prior to the scheduled QBR - This document not for client viewing

**Meeting Value**: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Add up the estimated hourly wage of each person expected to attend this meeting - That is your client’s cost of this meeting – make sure to deliver no less than DOUBLE that value.)

**Internal Items to review**:

* Alignment with standards
* Agreement profitability
* Project Status
* Perform a BDR Test Restore (get client involved)

- Make it personal - your technology should be helping their business not just stay secure but grow and be more profitable. "What processes take too much time? what can we help you automate? - Are we solving problems for you?"

- This is when you ask for referrals!!! Review the client contacts on LinkedIN and see who they might be able to introduce you to... when all else fails, go with "Who do you know that would see value in the type of info we discussed today? and would you be willing to make an introduction for me?"  
  
**Things to review with the client**:

* Alignment to your standards - where does this client deviate? where are they not drinking the whole cup?
* Vendor Contracts and Vendor Management [Issues]?
* Projects (current and upcoming/needed)

“You should be careful not to rely too heavily on boilerplate templates as you put together your Quarterly Business Review presentations. After all, one of the main reasons to conduct these meetings in the first place is to demonstrate your unique value to the customer as well as convey a sense of how important the customer is to you. Thus, each meeting—and the materials used at the meeting—should be tailored specifically to the customer. When approached thoughtfully, QBRs can help build bridges between your company and your customers, forming strong connections that will last throughout the customer lifecycle.” - Gainsight Blog [[Here]](https://www.gainsight.com/guides/the-essential-guide-to-quarterly-business-reviews/)  
  
**Our take:** Make your QBRs your own, and make them custom to your clients - what works for you won't work for me - so inquire with your client if they got value, and if you missed anything that was important to them\*\*\*

# Asset Lifecycle Report:

## Server (#)

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Server | User | Location | Make | Model | Serial | Operating System | Purchase Date | Warranty Expiration | End of Life | Replace Cost | Age |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |

## Workstation (#)

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Workstation | User | Location | Make | Model | Serial | Operating System | Purchase Date | Warranty Expiration | End of Life | Replace Cost | Age |
|  |  |  |  |  |  |  |  |  |  |  |  |
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## Network Eqp (#)

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Network Eqp | User | Location | Make | Model | Serial | IP Address | Purchase Date | Warranty Expiration | End of Life | Replace Cost | Age |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |

## Software (#)

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Software | User | Location | Vendor | Model | Serial | IP Address | Purchase Date | Warranty Expiration | End of Life | Replace Cost | Age |
|  |  |  |  |  |  |  |  |  |  |  |  |

## Other (#)

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Other | User | Location | Make | Model | Serial | IP Address | Purchase Date | Warranty Expiration | End of Life | Replace Cost | Age |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |

\*NOTE: This is a sample template of the lifecycle report automatically populated from Lifecycle Insights. If you don’t have that process automated yet, then be sure to allow for additional time to create.