Erick Simpson

Founder & Chief Strategist at ErickSimpson.com

Author, Consultant and Creator of the
MSP Mastered® Methodology

https://ericksimpson.com
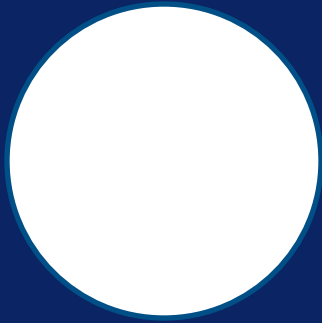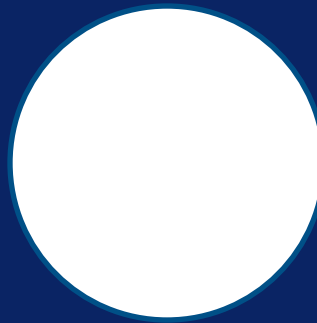
https://www.linkedin.com/in/ericksimpson

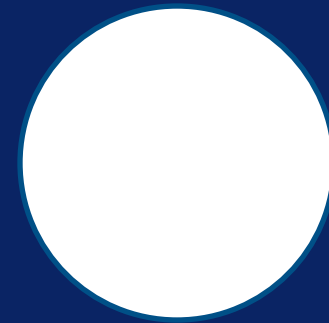# Client Type Determines Potential

Technology Strategic

Views technology spend as an investment that provides a competitive advantage

Technology Dependent

May not view technology spend as strategically, but business is so reliant technology that they are forced to maintain it

Technology Averse

Does not appreciate the importance of technology and in certain cases may fear it and its cost

Existing Client Sales Approach
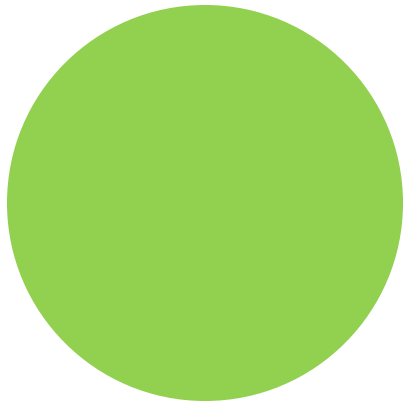
MOST SUCCESSFUL:

QBRS WITH TECHNOLOGY STRATEGIC CLIENTS
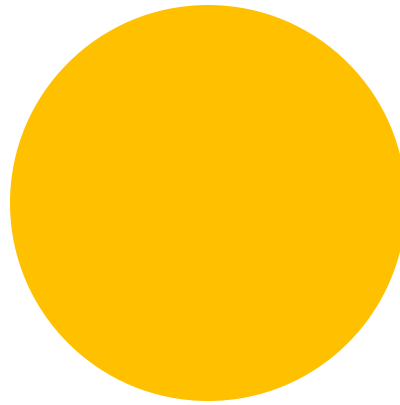
POTENTIALLY SUCCESSFUL:

QBRS WITH TECHNOLOGY AWARE CLIENTS
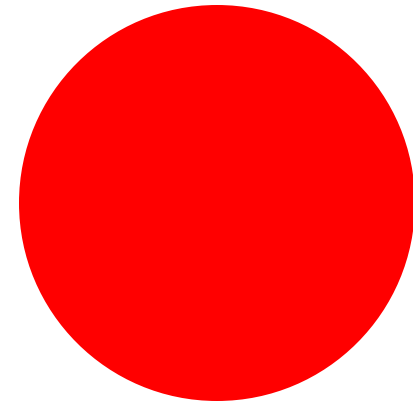
LEAST SUCCESSFUL:

QBRS WITH TECHNOLOGY AVERSE CUSTOMERS

If We Do Our Job Right…

Seek	Technology Strategic Clients
Accept	Technology Dependent Clients
Transform	Dependent Clients to Strategic

Qualifying Clients During QBRs With QBS

01
Establish Credibility
Use Diagnostic/Status Questions to uncover needs and Qualify Prospect

02
Identify Need
Use Issue Questions to discover if there are Active or Latent Needs and to make Client aware of Need

03
Connect Implications
Use Implication Questions to create Emotional Connection to Solution and Build Urgency

04
Position Away Alternatives
Let them know you can help

QBS Research Inc™

Strategic Business Review...How Often?

Technology Strategic or "A" Clients

Technology Dependent or "B" Clients

Technology Averse or "C" Customers

MSP MASTERED® CERTIFICATION
ITGlue Kaseya GRAPHUS ID AGENT UNITRENDS MSP RapidFireTools

QBR Sales Expansion Process

Preparation

- Service Delivery Reports
- Security Reports (AV/AS, Web Filtering, PEN, etc.)
- Backup Reports
- Patching/Updating Reports
- Compliance Reports
- User Surveys
- Trending

Delivery

- High-Level Overview of Reports
- Attention to Customer SAT
- Conduct Business Needs Analysis
- Align Service and Solution Recommendations to increase efficiencies, reduce costs, mitigate pain and reduce risk
- Conduct Budget Discussions
- Ask for Referrals!

Transforming Technology Dependent To Technology Strategic Clients

1st Quarter

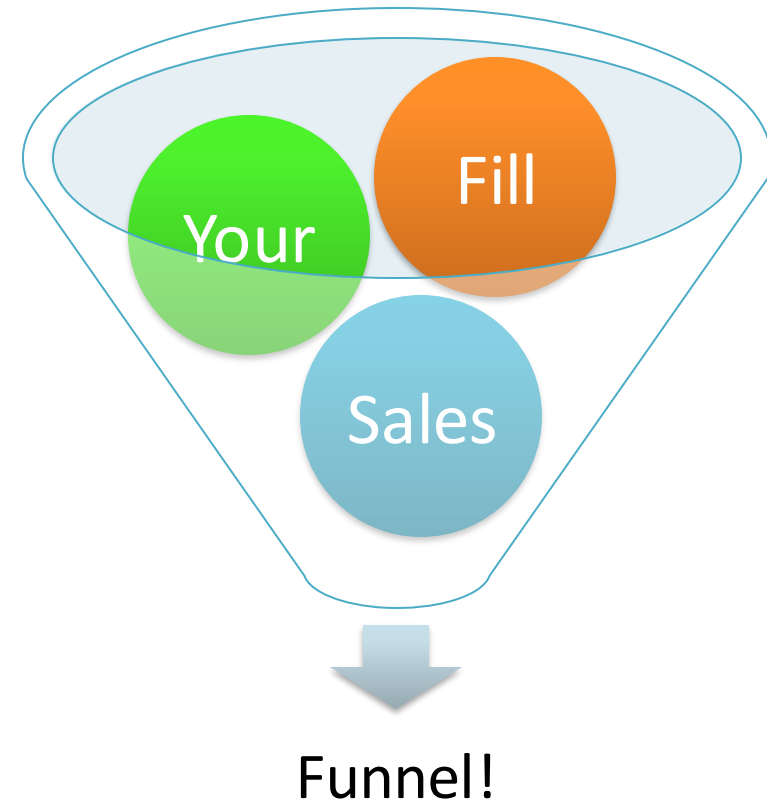Introduce Technology & Security Roadmap and Budget Discussions

2nd Quarter
Accelerate Roadmap and Budget Discussions

3rd Quarter
Each Meeting Revolves Around Roadmap and Budget

3 Year Strategic Technology Roadmap

1	First Year Projections							Est.
1.1 Disaster Preparedness		Document	Qty	Cost	Total	Date Due	Hours	
1.1.1	Disaster Recovery Plan			$0.00	$0.00			
1.2.1	Disaster Recovery Testing			$0.00	$0.00			
1.3.1	Business Continuity Planning			$0.00	$0.00			
				$0.00	$0.00			
1.2 Servers								
1.2.1	Physical Servers (Hardware Management)			$0.00	$0.00			
1.2.2	Physical Servers which are Hypervisors (Hypervisor Management)			$0.00	$0.00			
1.2.3	Active Directory/Domain Controllers (Physical or Virtual OS Mgt)			$0.00	$0.00			
1.2.4	File/Print/Application Servers (Physical or Virtual OS/App Mgt)			$0.00	$0.00			
1.2.5	Database Servers - SQL or MYSQL (Physical or Virtual OS/App Mgt)			$0.00	$0.00			
1.2.6	Microsoft Exchange (Physical or Virtual OS/App Mgt)			$0.00	$0.00			
1.2.7	Terminal Servers (Physical or Virtual OS/App Mgt)			$0.00	$0.00			
1.2.8	Web Servers (Physical or Virtual OS/App Mgt)			$0.00	$0.00			
1.3 Desktops/Laptops/Tablets/Smartphones								
1.3.1	Workstations			$0.00	$0.00			
1.3.2	Thin Clients			$0.00	$0.00			
1.3.3	Notebooks			$0.00	$0.00			
1.3.4	Tablets			$0.00	$0.00			
1.3.5	Smartphones			$0.00	$0.00			
1.3.6	Hardware Asset Management			$0.00	$0.00			
				$0.00	$0.00			
1.4 Printers								
1.4.1	Laser Printers			$0.00	$0.00			
1.4.2	InkJet Printers			$0.00	$0.00			
1.4.3	Specialty Printers			$0.00	$0.00			
1.4.4	Fax Machines			$0.00	$0.00			
1.4.5	Printer Supplies			$0.00	$0.00			
1.4.6	Fax Supplies			$0.00	$0.00			
1.4.7	Paper			$0.00	$0.00			
				$0.00	$0.00			
1.5 Software								
1.5.1	Operating Systems - Microsoft® Windows® Server 2016			$0.00	$0.00			
1.5.2	Operating Systems - Microsoft® Windows® 10 Professional			$0.00	$0.00			
1.5.3	Productivity Software - Microsoft® Office 2016 Professional			$0.00	$0.00			
1.5.4	Microsoft® Software Assurance			$0.00	$0.00			
1.5.5	Other Software Maintenance			$0.00	$0.00			
1.5.6	Software Asset Management			$0.00	$0.00			
				$0.00	$0.00			

Advanced Client Technology Solutions Roadmap

Client Name	Managed Services	Security	Managed Security	BDR Potential Revenue	Telco Per User	Mobile Device Management
	$150.00	$100.00	$50.00	$150.00	$35.00	$8.00
Client 1	$54,000.00	$1,200.00	$18,000.00	$1,800.00	$12,600.00	$2,880.00
Client 2	$54,000.00	$1,200.00	$18,000.00	$1,800.00	$12,600.00	$2,880.00
Client 3	$45,000.00	$1,200.00	$15,000.00	$1,800.00	$10,500.00	$2,400.00
Client 4	$45,000.00	$1,200.00	$15,000.00	$1,800.00	$10,500.00	$2,400.00
Client 5	$45,000.00	$1,200.00	$15,000.00	$1,800.00	$10,500.00	$2,400.00
Client 6	$72,000.00	$1,200.00	$24,000.00	$1,800.00	$16,800.00	$3,840.00
Client 7	$63,000.00	$1,200.00	$21,000.00	$1,800.00	$14,700.00	$3,360.00
Client 8	$54,000.00	$1,200.00	$18,000.00	$1,800.00	$12,600.00	$2,880.00
Client 9	$54,000.00	$1,200.00	$18,000.00	$1,800.00	$12,600.00	$2,880.00
Client 10	$54,000.00	$1,200.00	$18,000.00	$1,800.00	$12,600.00	$2,880.00
Client 11	$54,000.00	$1,200.00	$18,000.00	$1,800.00	$12,600.00	$2,880.00
Client 12	$54,000.00	$1,200.00	$18,000.00	$1,800.00	$12,600.00	$2,880.00
Client 13	$54,000.00	$1,200.00	$18,000.00	$1,800.00	$12,600.00	$2,880.00
Client 14	$45,000.00	$1,200.00	$15,000.00	$1,800.00	$10,500.00	$2,400.00
Client 15	$45,000.00	$1,200.00	$15,000.00	$1,800.00	$10,500.00	$2,400.00
Client 16	$45,000.00	$1,200.00	$15,000.00	$1,800.00	$10,500.00	$2,400.00
Client 17	$45,000.00	$1,200.00	$15,000.00	$1,800.00	$10,500.00	$2,400.00
Client 18	$45,000.00	$1,200.00	$15,000.00	$1,800.00	$10,500.00	$2,400.00

Quarterly Business Review Agenda Template

QUARTERLY BUSINESS REVIEW AGENDA

I. **VISION**
    A. GOALS & OBJECTIVES
        1. 3-6 MONTHS
        2. 1-5 YEARS
    B. BUSINESS CHALLENGES

    C. BUSINESS OPPORTUNITIES

    D. TECHNOLOGY CHALLENGES

    E. TECHNOLOGY OPPORTUNITIES

II. **ACCOMPLISHMENTS / UPDATES**
    A. _____
    B. _____

III. **SURVEY RESULTS**
    A. _____

IV. **STRATEGIC DECISIONS**
    A. BUDGET THIS QUARTER
    B. SOLUTIONS THIS QUARTER

V. **OPEN DISCUSSION**

ACTION ITEMS

WHO	WHAT	WHEN

MSP MASTERED® CERTIFICATION

ITGlue   Kaseya   GRAPHUS   ID AGENT   UNITRENDS MSP   RapidFireTools

QBR Do's and Don'ts

Create a recurring schedule

Prepare and be on time

Develop a consistent Agenda

Transform Dependents

Be strategic

Miss or reschedule QBRs

Spend too much time in weeds

Perform service

Leave without a budget commitment

Leave without referrals