

Quarterly Business Review

[Client name] - [Quarter and year]

Prepared by [Your MSP] - [Date]

Attendees: [client owner / ops lead / finance] and [your account manager / vCIO]

How to use this template: fill it in the week before the meeting, not the night before.
Delete the guidance lines (like this one) before you print. If a section has nothing worth saying this quarter, cut the section.

Agenda - 60 minutes

1. Wins and service scorecard - 10 min
2. What changed in your environment - 10 min
3. Commitments from last quarter - 10 min
4. Recommendations and budget - 20 min
5. Next steps and next review date - 10 min

1. Executive summary

Guidance: lead with what the quarter meant for their business. Never open with ticket counts - somewhere in that room is a CFO quietly dividing your ticket count by what they pay you. Open with the outcome: what stayed up, what got faster, what risk got retired.

The quarter in three sentences:

[What we protected or improved, in business terms.]

[The one thing that changed - a migration, a new site, a threat handled.]

[The one decision we need from you this quarter, previewed here.]

2. Service scorecard

Guidance: pick 5-7 metrics and keep them identical quarter over quarter so trends mean something. Every metric gets one line of consequence - a metric without a consequence is trivia.

Metric | Target | Actual | RAG | What it means for you

First response, business hrs | [15 min] | [] | [G/A/R] | [how fast your team gets unblocked]

Time to resolution | [8 hrs] | [] | [G/A/R] | []

Client satisfaction (CSAT) | [95%] | [] | [G/A/R] | []

Patch compliance | [98%] | [] | [G/A/R] | [exposure window for known exploits]

Backup success rate | [100%] | [] | [G/A/R] | [worst-case data loss window]

Endpoints under management | [all] | [] | [G/A/R] | [unmanaged devices = unpriced risk]

3. Support activity

Guidance: tell the story before the numbers. 'Requests are down 20% since the printer fleet was replaced' is a narrative; '312 tickets' is a bill. Raw data goes in the appendix workbook.

Themes this quarter: [top 3 categories and what is driving them]

Trending down because: [what you fixed at the root]

Trending up because: [what changed on their side - new hires, new app, new site]

Notable incidents: [anything they felt, with cause and prevention - own it plainly]

4. Your environment: assets and lifecycle

Guidance: this section earns next year's hardware budget. Show age and warranty honestly, and attach a quarter and a number to every red row - a risk without a price is just nagging.

Asset group | Count | Aging / out of warranty | Replace by | Est. cost

Workstations / laptops | [] | [] | [Qx 20xx] | [\$]

Servers / hosts | [] | [] | [] | [\$]

Network: firewalls, switches, APs | [] | [] | [] | [\$]

Licensing / SaaS renewals | [] | [renewal dates] | [] | [\$]

5. Recommendations and commitments

Guidance: this ledger is the reason QBRs exist. Carry every open line forward each quarter - including the declined ones. When a client declines a recommendation, record it in writing with the date: it keeps the decision honest, and if the risk lands later, the paper trail protects both of you.

Recommendation | Raised on | Business impact | Est. cost | Status | Notes

[Retire Server-02, out of warranty] | [date] | [what breaks if it fails] | [\$] | Proposed | []

[MFA on remaining accounts] | [date] | [account-takeover exposure] | [\$] | Approved | [owner, date]

[Offsite backup for file server] | [date] | [recovery time today vs after] | [\$] | Declined | [by whom, date, reason]

[Completed last quarter] | [date] | [] | [\$] | Done | [completed date]

Status values: Proposed / Approved / Declined / Done

6. Next steps

Decisions made today: [read them back before anyone leaves the room]

Owners and dates: [every action has one name and one date]

Next review: [date - booked before the meeting ends]

Appendix

Raw detail lives here, not in the meeting: full ticket list, asset inventory, patch report, backup logs. Anyone who wants to audit the numbers can - nobody has to sit through them.

Template by QBR Studio (qbrstudio.com) - or connect your PSA and skip the template: your QBRs prepare themselves.