

MSP Name: [Your MSP Name] | Client: [Client Name] | Quarter: Q[X] [Year]

Meeting date: [Date] | Prepared by: [Name]

Quarter at a Glance

Metric	Q[X]	Q[X-1]	Trend
Total tickets			
Avg resolution time			
Critical system uptime			
SLA compliance			
Security incidents			
Client satisfaction (/10)			

Technology Health Scorecard

Score each area 1-10. 1-4 = needs immediate attention. 5-7 = acceptable with known gaps. 8-10 = strong.

Area	Score (/10)	Notes
Network infrastructure		
Endpoint management		
Security posture		
Backup and recovery		
Cloud services		
User experience		
Overall		

Progress Against Last Quarter's Goals

Goal	Status (Done/In progress/Not started)	Notes

Security and Compliance Update

Cover three things: (1) notable incidents this quarter, (2) current threat landscape for this client's industry, (3) compliance status.

IT Roadmap Review

Completed this quarter

- [] _____
- [] _____
- [] _____

In progress

- [] _____
- [] _____

Deferred (and why)

- [] _____
- [] _____

Budget Review

Category	Budgeted	Actual	Variance	Notes
Support and labour				
Licensing				
Hardware				
Projects				
Total				

Risk Register

Risk	Likelihood (H/M/L)	Impact (H/M/L)	Mitigation	Owner

Strategic Recommendations

Written for a business decision-maker. What should the client invest in or decide on over the next 6-12 months.

Recommendation	Priority	Est. Cost	Decision needed by

Goals for Next Quarter

Goal	Owner (MSP/Client/Shared)	Target Date	Success Measure

Next QBR

Next QBR scheduled: _____ | Prepared by: _____