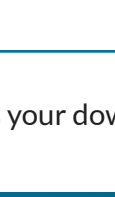


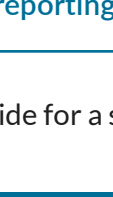
A practical QBR checklist for MSPs

Quarterly business reviews are where you step up as a strategic partner. It's your opportunity to show clients how you're making a real difference, not just solving problems.

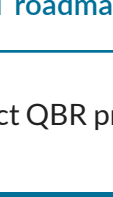
This checklist helps IT professionals:




Standardize service delivery



Streamline assessments and reporting



Build proactive, results-driven IT roadmaps



Run focused, outcome-driven client meetings

Use it as your downloadable, go-to guide for a scalable, high-impact QBR process.


PART 1 Standards

Clear, well-maintained standards ensure consistency across clients, make service delivery scalable and prove long-term value.

- Do we currently have a standards council?
- Do we review and update standards monthly or quarterly?
- Are our standards organized into clear categories for easy tracking?
- Have we identified the top three most important categories for our business (e.g., security, onboarding)?
- Have we listed up to five key standards to prioritize improving or reviewing next quarter?
- Are our standards customized per client needs, or can we establish a shared baseline across multiple clients?

Action questions:

- Who are our standard council members? _____ / _____ / _____
- What are the top three standard categories that matter most to us? _____ / _____ / _____
- What are the top five specific standards we will prioritize next quarter? _____ / _____ / _____ / _____ / _____



Pro tip: Put in upfront work. Creating and maintaining strong standards saves time, increases consistency and builds client trust over time.

PART 2 Assessments

Each assessment should be focused and actionable, with clear ownership and defined deliverables. This ensures you move beyond simply collecting data to delivering results.

- Is each assessment scoped clearly?
- Have we assigned clear accountability for assessment outcomes?
- Are we using assessments to evaluate whether our standards are delivering measurable value?
- Have we scheduled the next assessment and identified deliverables tied to it?
- Are we using recurring calendar invites to ensure assessments happen consistently?
- Are our assessments customized per client needs, or can we establish a shared baseline across multiple clients?

Action questions:

- What is the focus of our next assessment? _____
- When is the scheduled assessment date? _____
- What deliverables will come from this assessment? _____ / _____



Pro tip: Keep scopes tight, plan a full day per assessment and always tie assessments to meaningful deliverables.

PART 3 IT roadmap

A proactive IT roadmap keeps you ahead of client needs, aligns IT with business goals and ensures smart, strategic budgeting.

- Is our roadmap proactive (not just a reactive list of tasks)?
- Have we grouped initiatives into meaningful categories (e.g., cloud migration, security upgrades)?
- Are we leveraging integrations (like Autotask, IT Glue) to strengthen visibility and support our roadmap process?
- Are we reviewing and updating the roadmap regularly (monthly or quarterly), based on a set cadence?
- Have we identified the next major initiative, estimated its budget and set a timeline for execution?
- Are our IT roadmaps customized per client needs, or can we establish a shared baseline across multiple clients?
- Do we know the state of each client's roadmap inside and out?

Action questions:

- What are the top three roadmap categories we're focused on? _____ / _____ / _____
- Which integrations will we implement to enhance roadmap visibility? _____ / _____ / _____
- What is the next strategic initiative we plan to add? _____
- What is the estimated budget range for that initiative? _____
- What is the timeline we're setting to execute it? _____



Pro tip: Be sure to update your roadmap on a regular basis, not only when a meeting is coming up. Treat each initiative as part of a broader strategic category, not just an isolated task.

PART 4 QBR reporting

Report should connect technical details to business outcomes, helping clients understand progress, priorities and value, not just raw data.

- Have we removed unnecessary data and focused only on what's relevant for each specific client?
- Is the report customized to reflect the client's business context, goals and environment?
- Do reports clearly tie back to our standards, assessments and roadmap?
- Are we creating clear, visual executive summaries (not overwhelming data dumps)?
- Have we selected the right reports to include in the next QBR?
- Are we connecting the dots for clients by clearly tying technical data to business outcomes?
- Are we leveraging templates to fast-track report creation?
- Have we included additional reports beyond what was requested to demonstrate proactivity and strategic thinking?

Action questions:

- Which reports will we include in the next QBR (check all that apply)?

Alignment report	Progress report
Device lifecycle report	Microsoft licensing report
Warranty report	Executive summary
- How will we personalize the reports for this client (e.g., add business notes, tailored executive summary)? _____
- What key tools or integrations do we need to connect to generate these reports efficiently? _____



Pro tip: Automate repetitive reporting tasks and always add a human layer to highlight your value.

PART 5 Client meetings

QBR meetings are your opportunity to drive strategic conversations, strengthen relationships and prove your MSP's value beyond day-to-day service.

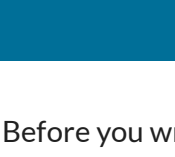
- Are we meeting regularly with each client (monthly, quarterly or other)?
- Have we reviewed the reports and key talking points in advance of the meeting?
- Are meetings structured with clear goals and outcomes?
- Are we inviting key decision-makers and stakeholders?
- Have we created a limited-access user login for the client to preview relevant information ahead of time?
- Did we send the finalized PDF report to the client prior to the meeting?
- Are we using the right format for each client (virtual, in-person or hybrid)?
- Have we reviewed and documented call notes immediately after the meeting to capture key takeaways and action items?
- Are our meeting agendas customized per client needs, or can we establish a shared baseline across multiple clients?

Action questions:

- What is the QBR meeting cadence for this client? _____
- What format will we use (virtual, in-person, hybrid)? _____
- Which stakeholders are we inviting (check all that apply)?

Primary contact	Business owner	Technical lead
Finance/procurement	Other: _____	
- What is our post-meeting follow-up plan (check all that apply)?

Email summary	Action items with deadlines	Next meeting invite
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Pro tip: Always invite key decision-makers, reinforce strategic themes and follow up with clear action steps to keep momentum.

Final takeaways

Before you wrap up, take a moment to reflect on what you've uncovered. What changes can you make today to strengthen your QBR process? Where does your team need support or a fresh approach?

Use the space below to capture your key next steps:

- What is one improvement I'll implement this month? _____
- What is one change I'll share with the team today to get buy-in on? _____
- Are there any blockers or support I need to succeed? _____

Want to dive deeper or get extra help implementing what you've worked through in this checklist? These Knowledge Base articles will give you step-by-step guidance, tool support and best practices to strengthen your QBR process.

- [QBR Report Builder](#)
- [Device Lifecycle Management](#)
- [Strategic Roadmap](#)
- [Standards Library](#)

Ready to take it further?

myITprocess makes it easier to put this entire checklist into action, from building proactive IT roadmaps to delivering clear, strategic QBRs that wow your clients.

See how myITprocess can streamline your QBR process and help you deliver consistent, high-impact client meetings.

Book a demo today

