Client QBR Template

A one-hour quarterly business review that shows your value and agrees the next projects.

How to use it: fill this in before the meeting from your PSA, RMM and Microsoft 365 data, send it to the client a day ahead, and keep the meeting to decisions.

1. Wins since last review (5 min)

TALKING POINTS	NOTES
Projects completed and what they changed	
Problems solved before the client noticed	

2. Service summary (10 min)

TALKING POINTS	NOTES
Tickets this quarter versus last, and the top three causes	
Response and resolution times against the agreement	

3. Security posture (10 min)

TALKING POINTS	NOTES
Secure Score and MFA coverage, and the trend	
Open security findings, ranked by risk	

4. Devices and lifecycle (5 min)

TALKING POINTS	NOTES
Devices out of support or due for refresh in the next 12 months	
Devices not covered by the contract	

5. Backup and continuity (5 min)

TALKING POINTS	NOTES
Backup coverage and failed jobs	
Date and result of the last test restore	

6. Licensing and cost (5 min)

TALKING POINTS	NOTES
Unused or mismatched licences	
Upcoming renewals	

7. Recommended projects (10 min)

PROJECT	WHY IT MATTERS	ESTIMATE	PRIORITY	TIMING

8. Business plans and decisions (10 min)

TALKING POINTS	NOTES
Hiring, office moves or new systems planned in the next 12 months	
Decisions made today, owners and dates	

Run these checks in minutes. MSPSnaps reads Microsoft 365, Autotask and NinjaOne read-only and turns the gaps into branded client reports with projects to quote. Start free at mspsnaps.com.

Template provided as a starting point. Adapt the agenda to each client and your service agreement.