



one page summary



speaker

Marnie Stockman

title

Scale your vCIO process to deliver the QBR your clients deserve

Who's the speaker?

Marnie Stockman is the CEO of Lifecycle Insights, a business that's focused on helping MSPs streamline the review processes they have in place to deliver QBRs that add value and drive sales.

The big idea

The core idea of this talk is to help you convert standard business reviews into strategic conversations with your clients.

The breakdown

Marnie breaks down strategic QBRs with three lines of reasoning:

Why:

- Talking strategy to clients can be a strong competitive edge; if you're not doing it, then someone else eventually will
- These conversations keep the client relationships human, in a heavily automated world
- These conversations elevate you from just another vendor to a trusted advisor when they look to grow

What:

These strategic conversations to be proactive, and prepare well in advance to deliver a great review. By doing so, you're going beyond a routine meeting, to a conversation that shows them a roadmap for the future, and the tools they need to get there.

How:

- Present a summary that talks about their progress, and follow up with the next steps for progress
- Align their business pains with what they can do about it

Action points:

- Just keep doing something. Don't go for perfection, don't procrastinate. Keep executing, one small item at a time
- 4 steps to get started:
 - Set a cadence for each of your clients
 - Plan and prep them by sending a shared agenda to clients at least 3 weeks before the review
 - Keep the QBR engaging—bring clients into the strategic conversation by asking questions and running surveys
 - Follow up with clients at the end of each QBR to ensure that the clients received value out of it. If the answer is no, keep asking questions to understand exactly how to make the next review better



Budgets don't get cut.
Line items do.

- While delivering the QBR, don't list items they need. Offer recommendations that highlight the clear value in buying the items you recommend.