**This SOP will outline and track procedures and responsible parties for performing regularly scheduled business reviews with MSP clients.**

1. **PURPOSE: Standardize the (x)BR**
2. **SCOPE:** This document covers the (x)BR from start to finish and post (x)BR activities
3. **PARTICIPANTS: vCIO / Account Manager / Dispatch / Support Tech / Intern**
4. **PROCEDURE:**

| **Responsible Party** | | **Action Step** |
| --- | --- | --- |
| Sales Assistant (workflow) | | Create xBR ticket and assign resources (3 weeks in advance) |
| Sales Assistant | | Send Agenda and Feedback requests to client. “What’s changed/changing in your business or industry?” |
| Intern / Support Engineer | | Check patch status and create tickets for anomalies |
| Intern / Support Engineer | | Check DNS security report and create tickets for anomalies |
| Intern / Support Engineer | | Check AV report and create tickets for anomalies |
| Intern / Support Engineer | | Check Warranty report and create Recommendation(s) for expirations |
| Intern / Support Engineer | | Check Dark Web report and note new breaches for discussion at xBR |
| Intern / Support Engineer | | Check ESS report and note scores below ### for discussion at xBR |
| Intern / Support Engineer | | Check Phishing Campaign report and note new failures for discussion at xBR |
| Security Engineer - To be delegated in the future | | Run fresh network scan using Cyber CNS / Network Detective |
| Security Engineer - To be delegated in the future | | Check Network Scan reports and create tickets for anomalies. Note new devices for discussion at xBR |
| Support Engineer | | Check Key Security Groups (admin, domain admin, enterprise admin, schema admin) and note anomalies for discussion at xBR |
| Intern / Support Engineer | | Review LCI Assets, Users, and Microsoft tabs and note anomalies for discussion at xBR |
| Support Engineer / Office Manager / Account Manager / Owner | | Schedule the xBR with the client. Add resources accordingly     * Tech? * AM/CS? * vCIO? |
| Intern / Support Engineer | | Upload Patch Report |
| Intern / Support Engineer | | Upload DNS Security Report |
| Intern / Support Engineer | | Upload Anti-Virus Software Report |
| Intern / Support Engineer | | Upload Huntress Software Report |
| Intern / Support Engineer | | Upload Lifecycle Insights Warranty Report |
| Intern / Support Engineer | | Review BSN Report |
| Intern / Support Engineer | | Upload Network Scan - Security Report |
| Intern / Support Engineer | | Upload Network Scan - Powerpoint |
| Intern / Support Engineer | | Upload Financial Report (profitability) (probably private) |
| Alternate Intern / Support Engineer | | Verify LCI Tabs - Assets, Users, Contracts (Second set of eyes) |
| Alternate Intern / Support Engineer | | Verify Reports (Second set of eyes) |
| Intern / Support Engineer | | LCI Ticket Volume Report |
| Leadership / Account Managers | | Deliver (x)BR |
| Leadership / Account Managers | | Enter Tickets for Deliverables |
| Leadership / Account Managers | | Follow-up Questions:   * What can we do better or different? * When should we meet again? * Who do you know that would benefit from this type of meeting? * Would you give me a Google Review? |
| Sales Assistant | | Follow up on (x)BR Deliverables |
| Sales Assistant | | Schedule future (x)BRs (workflow) |

**VERSION HISTORY**

| **VERSION** | **EFFECTIVE DATE** | **DESCRIPTION OF CHANGE** |
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