**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?
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| 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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