# **Strategic Business Review Agenda (Sample)**

Check in (5 min - vCIO)

Scorecard (5 min - *Optional - skip this with strategically mature clients*)

Relevant Metrics Selected from:

* + BDR Stats (Optional)
  + Patch Stats (Optional)
  + CSAT Results Review (Optional)
  + Storage (Optional)
  + AV Stats (Optional)
  + SPAM Stats (Optional)
  + Office 365 SecureScore (Optional)

Relevant Action Items (5 min)

Carry-over Action Items from last SBR (if any)



Recent Project Status Update (5 min)



Client Updates & Changes (15 min)

* + What is changing with the client in the next 18 months?
  + What is changing in the client’s industry? Commoditization? Growth? New Technology?
  + Is their business growing or shrinking?
    - Are they adding employees?
    - Locations?
    - New Technology?
  + Environment at a Glance
    - Asset Report
    - User Report (If necessary)
    - Office 365 Overview Review (if necessary)
    - Documentation Review (do we need anything from them to update/improve our documentation?)

**Review of Exposure and Risk:**(45 min)

To-Do's:

* + Review Latest Risk Assessment
  + Review Known Assets for:
    - Security Upgrades (out of date OS or vendor EOL)
    - Lifecycle Upgrades
  + Present/Review Budget and Proposed Projects

**Issues list**: Identify, Discuss, Solve (30 min)



**Wrap up:** (5 min)

Schedule next QBR

Document new action items (to become tickets)