# **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		- Security Upgrades (out of date OS or vendor EOL)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)

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**Wrap up:** (5 min)

Schedule next QBR

Document new action items (to become tickets)

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	+
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