**Client Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Item** | **Initials** | **Date** |
| Technology Plan Review* Review the plan before your appointment
 |  |  |
| * Confirm date/time of your meeting with client contact
 |  |  |
| Security Reports (Complete 2 weeks prior to meeting)* Run phishing scam test
* Run darkweb scan test
* Complete Security Assessment
* Complete Ransomware Protections Checklist
 |  |  |
| Review Previous quarter agreement usage* # of users in agreement \_\_\_\_\_\_\_ vs. Actual\_\_\_\_\_\_\_\_
* Ave # of tickets / month
* # of missed SLA: \_\_\_\_\_\_\_\_\_\_\_
* Confirm billed backup storage amount vs. Actual
 |  |  |
| Review A / R* Print statement (if needed)
* Print all pending invoices (if needed)
 |  |  |
| Prepare QBR folder* Print Agenda
* Print new Inventory Report
* Print Warranty Renewal Report
* Print Executive report (if first meeting)
* Print latest agreement invoice
 |  |  |
| Review Services being used* Basic Plan - Remote Monitoring
* Basic Plus Plan – Monitoring and Remote Support
* Gold Plan – All-In Support
* Basic Backup and Recovery Plan
* Gold Backup and Recovery Plan
* Office 365
* VoIP Services
* Email Encryption / Advance Protection
* Security Monitoring
* Assessments
 |  |  |
| * Review Previous quarter projects
 |  |  |
| Review strongly recommended updates / upgrades / projects* Confirm servers have active warranty /exp date\_\_\_\_\_\_\_\_\_\_\_\_\_
* Confirm firewalls have active warranty / exp date \_\_\_\_\_\_\_\_\_\_\_\_
* Confirm BDR has active warranty / exp date \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Training
* Any other recommendations \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Denial of Services (required if recommendations are refused)
 |  |  |
| * Referral Request
 |  |  |
| * Update Runbook and Network Documentation
 |  |  |
| * Confirm next meeting with client contact
 |  |  |

NOTES: