**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: