

Successful IT clients make **successful MSPs**, ensure your clients have the **right IT for their needs, budgets and goals**, and help them **turn their plans into reality**.

Turn your client's  
business strategy into  
MSP Governance and  
Execution,  
so they can achieve  
their dreams



**DISCOVER** all your client's IT needs and build them a roadmap + budget **MANAGE** all their IT to their requirements and **NURTURE** your relationship with a better QBR that creates value for you and them

## There are two types of MSPs

1. MSP's that will change the nature of their relationship and services to their clients.

Or

2. MSP's that will die.

# 2

### Client-focused MSPs will win

MSPs that solve their client's business problems will win :

- demonstrate a strategic understanding of their clients
- manage all their clients IT
- have relationships with the business leaders

Tech focused MSP's will lose : MSPs that stick with tickets, SLAs, life cycles, PCs and licenses will face increased competition, commodity pressures and decreased profit

**Solve the MSP Paradox** : Your client may have less physical IT for you to manage, but they have more IT systems and are more reliant on IT than ever. They need an MSP partner who can proactively match their needs to best-in-breed solutions.

But if you're stuck in a reactive mode, waiting for your clients to come to you, then the managed services revolution will pass you by and take your clients with it.

That's why we've created GetKambium, a tool to help staff get inside clients' heads and understand their business, so you can stop delivering low-margin IT infrastructure and start enabling business strategy

### Do you want :

- **(new) Scalable MRR services** that don't depend on traditional IT support services?
- Better **qualified opportunities**?
- **New NRR work** and consulting?
- **Stronger relationships** with higher value clients?
- **Growing revenues and profits**?
- **Differentiation** from competitors?

## How?

getKambium is a cloud app guides the MSP, with :

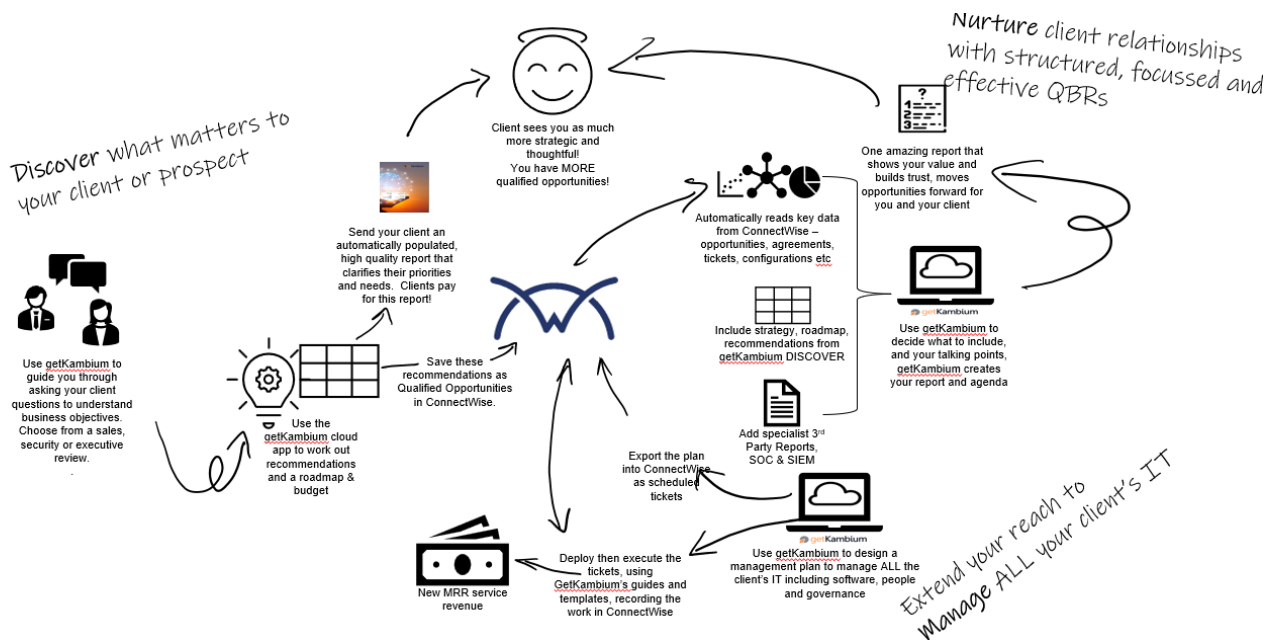
KNOW YOUR CLIENT with prepared questions to **DISCOVER** business needs,

tools to map how IT can address them,  
output into a detailed report, budget and plan.

These are converted into an executable plan, with sales opportunities, projects and tasks flowing into **ConnectWise**.

New MRR consulting revenue flows from the **MANAGE** pricing tool and delivery templates.

Use QBRs to **NURTURE** the client with a report that focuses on how the MSP is solving their business problems, making their value-add extremely clear.

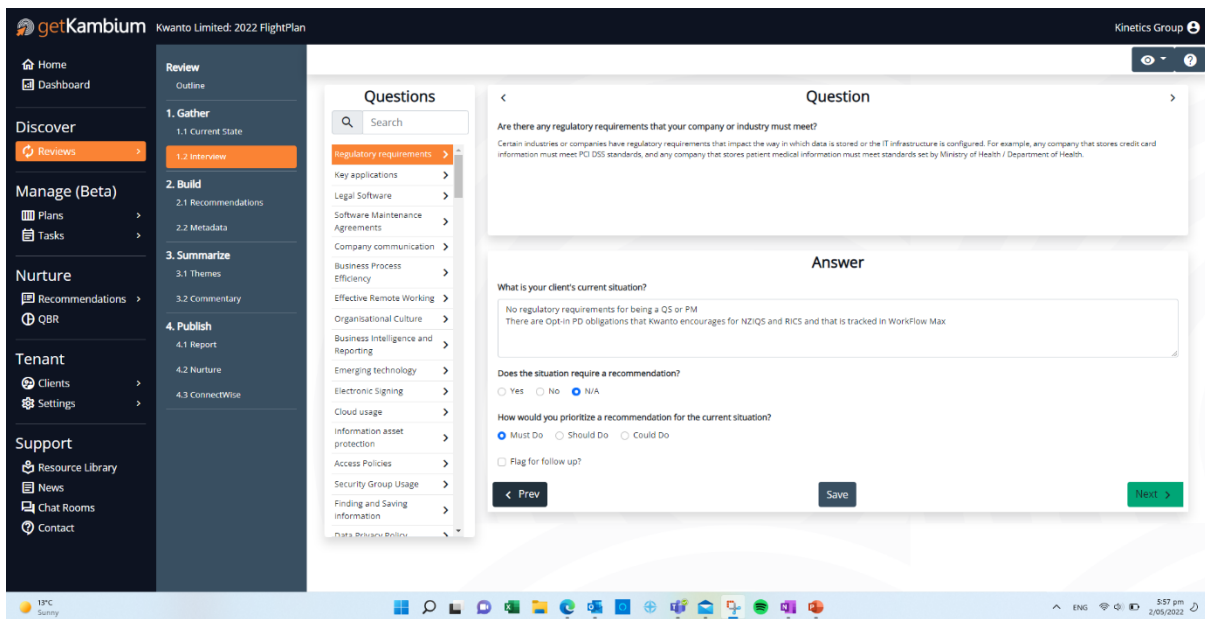




## Discover :

a tool to help talk business to your clients, not just IT

The goal is simple: To create a vision for technology that empowers your customer to leverage technology to improve revenue, reduce costs and improve security

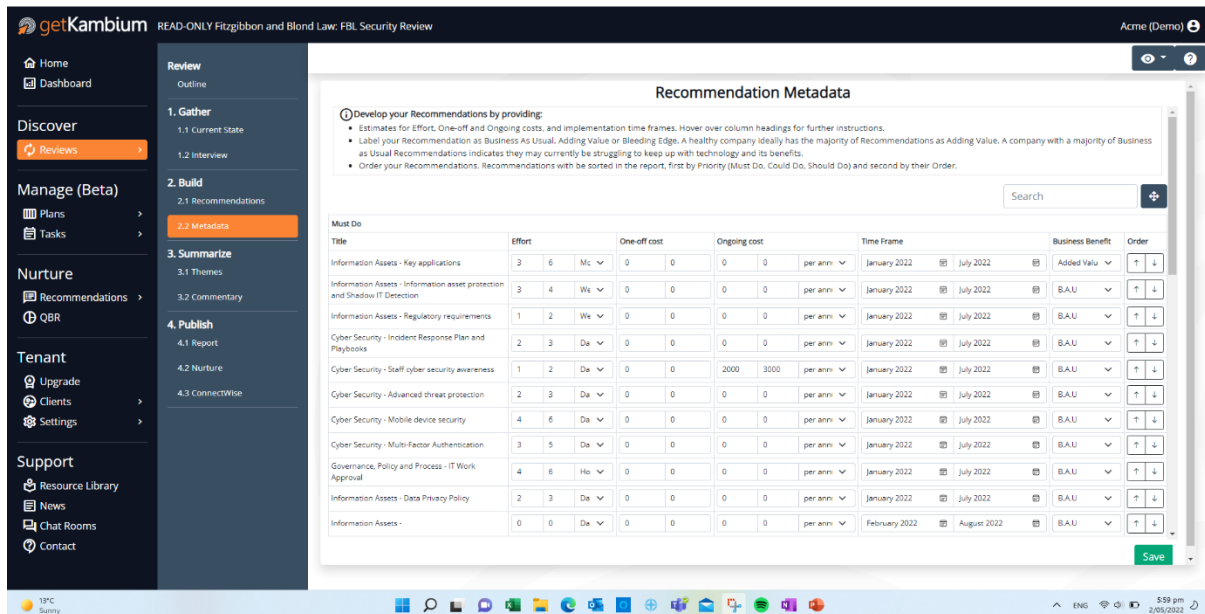


Can you help your clients answer key questions like:

1. Are they meeting obligations to shareholders/stakeholders?
2. Are the appropriate IT Governance controls in place to protect business value?
3. IT is more than silicon – have they stress-tested the human side of your I.T?
4. Are they maximising their technology investment?
5. Who really controls their IT systems and data?
6. Do they have an appropriate Data Privacy Policy?
7. Do they have the right relationship with their IT provider?
8. Is the IT strategy meeting their business needs?
9. Are staff their biggest security risk?
10. Is the organisation doing enough to get the cyber-security cost/risk balance right?

## Strategy Roadmaps

Gain full understanding of your client's current situation and their strategic priorities to achieve their goals and mitigate their risks. Uncover the client's priorities and work with the client to build a plan to achieve these, including against timelines and budgets.

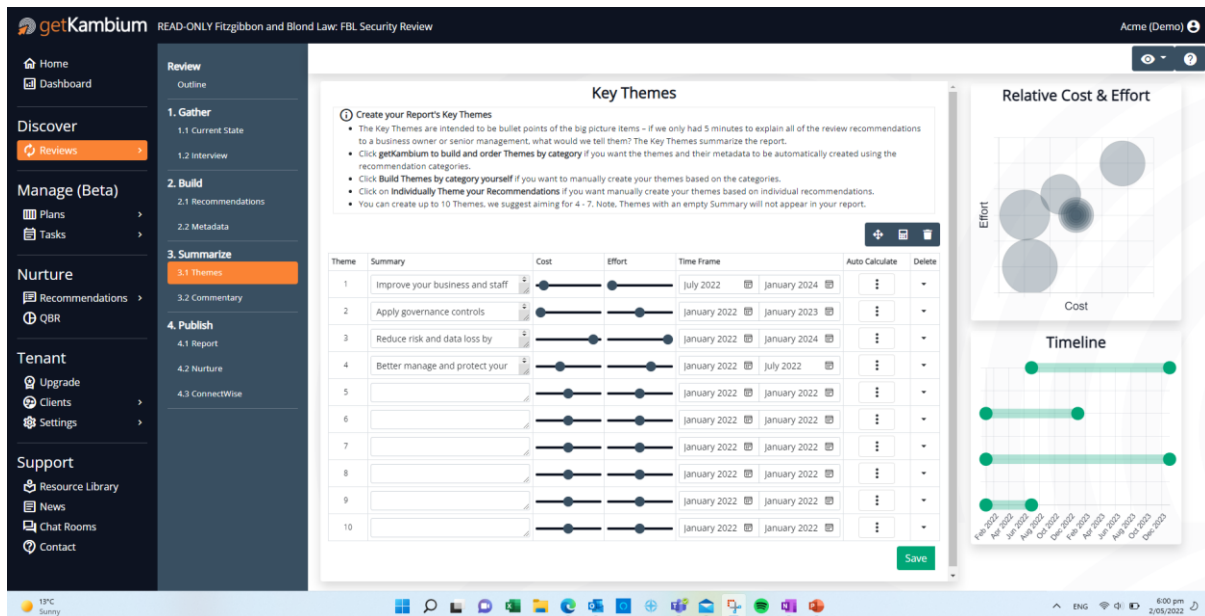


**Recommendation Metadata**

Develop your Recommendations by providing:

- Estimates for Effort, One-off and Ongoing costs, and implementation time frames. Hover over column headings for further instructions.
- Label your Recommendation as Business As Usual, Adding Value or Bleeding Edge. A healthy company ideally has the majority of Recommendations as Adding Value. A company with a majority of Business as Usual Recommendations indicates they may currently be struggling to keep up with technology and its benefits.
- Order your Recommendations. Recommendations will be sorted in the report, first by Priority (Must Do, Could Do, Should Do) and second by their Order.

Title	Effort	One-off cost	Ongoing cost	Time Frame	Business Benefit	Order
Information Assets - Key applications	3 6 Mc	0 0	0 0	per ann January 2022 July 2022	Added Valu	↑ ↓
Information Assets - Information asset protection and Shadow IT Detection	3 4 We	0 0	0 0	per ann January 2022 July 2022	BAU	↑ ↓
Information Assets - Regulatory requirements	1 2 We	0 0	0 0	per ann January 2022 July 2022	BAU	↑ ↓
Cyber Security - Incident Response Plan and Playbooks	2 3 Da	0 0	0 0	per ann January 2022 July 2022	BAU	↑ ↓
Cyber Security - Staff cyber security awareness	1 2 Da	0 0	2000 3000	per ann January 2022 July 2022	BAU	↑ ↓
Cyber Security - Advanced threat protection	2 3 Da	0 0	0 0	per ann January 2022 July 2022	BAU	↑ ↓
Cyber Security - Mobile device security	4 6 Da	0 0	0 0	per ann January 2022 July 2022	BAU	↑ ↓
Cyber Security - Multi-Factor Authentication	3 5 Da	0 0	0 0	per ann January 2022 July 2022	BAU	↑ ↓
Governance, Policy and Process - IT Work Approval	4 6 Ho	0 0	0 0	per ann January 2022 July 2022	BAU	↑ ↓
Information Assets - Data Privacy Policy	2 3 Da	0 0	0 0	per ann January 2022 July 2022	BAU	↑ ↓
Information Assets -	0 0 Da	0 0	0 0	per ann February 2022 August 2022	BAU	↑ ↓



**Key Themes**

Create your Report's Key Themes

- The Key Themes are intended to be bullet points of the big picture items - if we only had 5 minutes to explain all of the review recommendations to a business owner or senior management, what would we tell them? The Key Themes summarize the report.
- Click **getKambium** to build and order Themes by category if you want the themes and their metadata to be automatically created using the recommendation categories.
- Click **Build Themes by category yourself** if you want to manually create your themes based on the categories.
- Click on **Individually Theme your Recommendations** if you want manually create your themes based on individual recommendations.
- You can create up to 10 Themes, we suggest aiming for 4 - 7. Note, Themes with an empty Summary will not appear in your report.

Theme	Summary	Cost	Effort	Time Frame	Auto Calculate	Delete
1	Improve your business and staff	0 0	0 0	July 2022 January 2024		
2	Apply governance controls	0 0	0 0	January 2022 January 2023		
3	Reduce risk and data loss by	0 0	0 0	January 2022 January 2024		
4	Better manage and protect your	0 0	0 0	January 2022 July 2022		
5		0 0	0 0	January 2022 January 2022		
6		0 0	0 0	January 2022 January 2022		
7		0 0	0 0	January 2022 January 2022		
8		0 0	0 0	January 2022 January 2022		
9		0 0	0 0	January 2022 January 2022		
10		0 0	0 0	January 2022 January 2022		

**Relative Cost & Effort**

**Timeline**

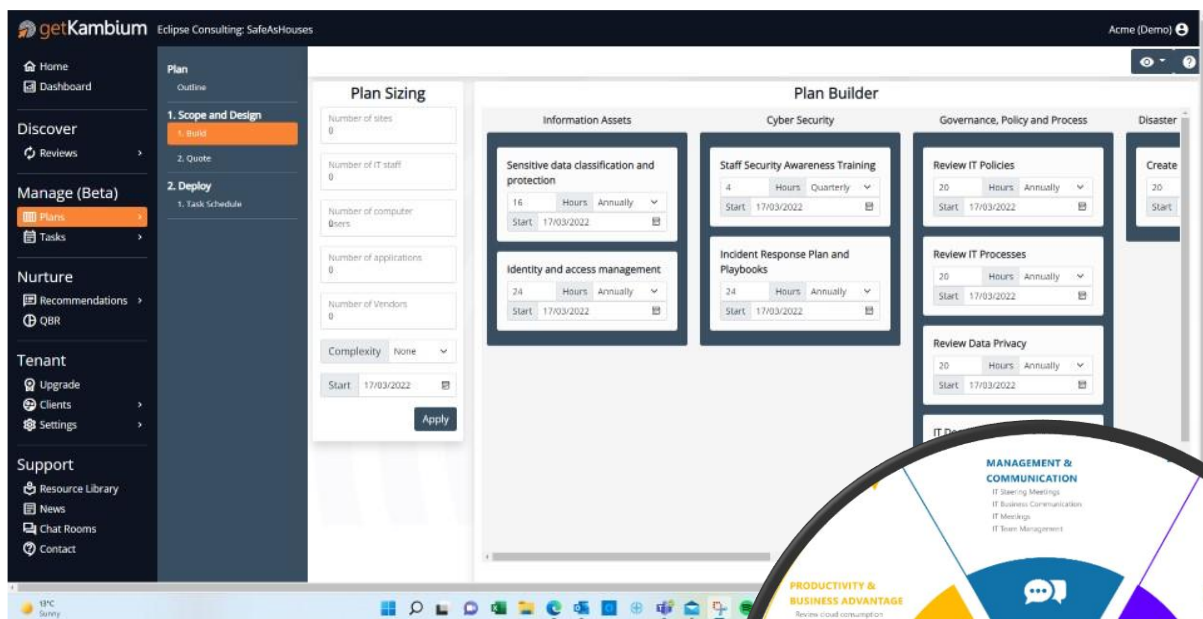
## Manage:

### Lead your client's digital transformation

Across organizations, IT Managers share between 80-90% common responsibilities. Our process covers all key aspects that IT Managers should be responsible for in a systematic methodology.

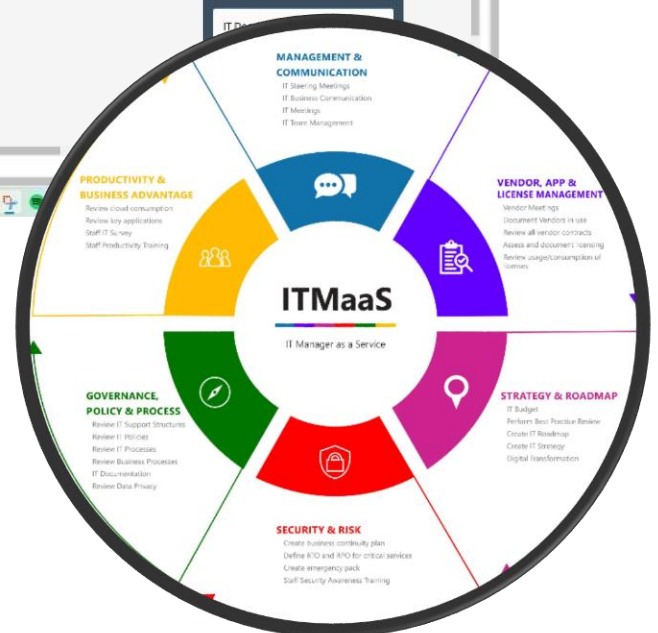
Create new MRR agreements for those clients that want ongoing IT advice and IT governance.

We've broken down the role of an IT Manager / CIO and given you the means to build a MRR agreement for your clients, quote it, and schedule, along with rich guides and templates to help you execute.



Built from real IT Manager & CIO job descriptions and role accountabilities, our ITMAAS system is THE answer to scalable, consistent, high-quality vCIO delivery.

GetKambium tells your consulting team what to do, when it needs to be done, and gives you the tools and templates you need





# QBR<sup>3</sup> (cubed)

## The three dimensions of great QBRs

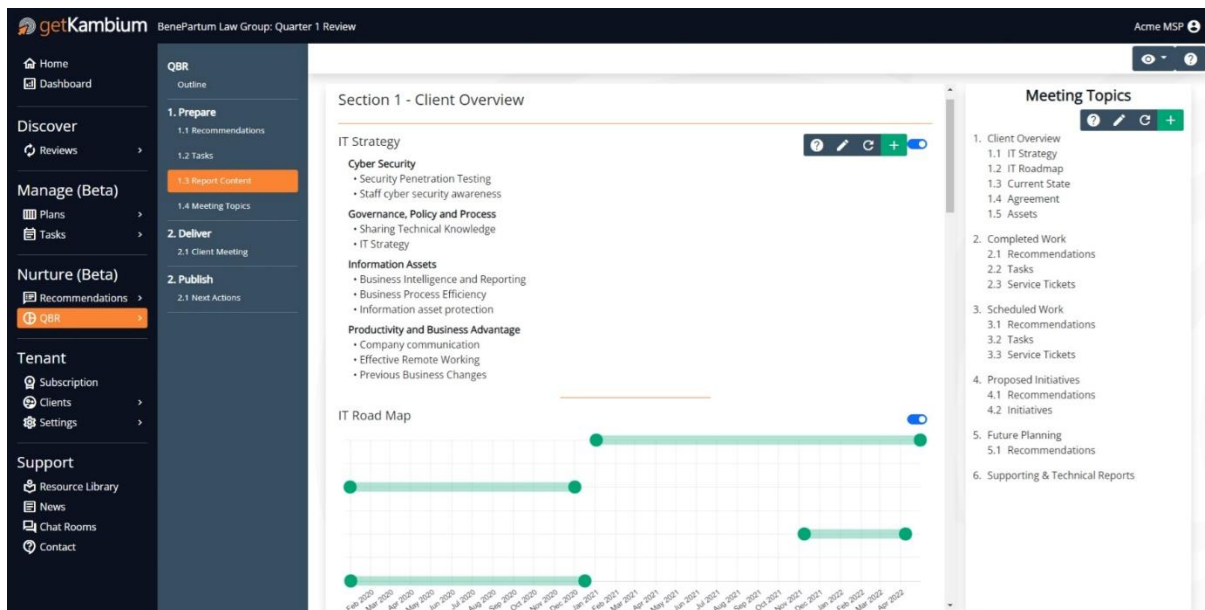
What do your customers need?

- Information about their current state
- Roadmap update : where they are heading and how it's tracking.
- Clarity on the decisions they need to make now.

What do you need?

Amazing QBR Reports that are fast to create.

- Amazing QBRs that your clients value and want to attend.
- Amazing QBRs that help you progress your client relationship and advance your sales pipeline.



Prove your value to your clients.

Prove the value you give your client while getting agreement for new projects from their IT roadmap with deliberate, purposeful QBRs.

Formalize client check-ins and keep your relationship focused on the thing that matters most to your client – helping them create enterprise value. Our QBRs are quick and easy to produce, purposeful and create value for you, and your client.



## Imagine a solution that

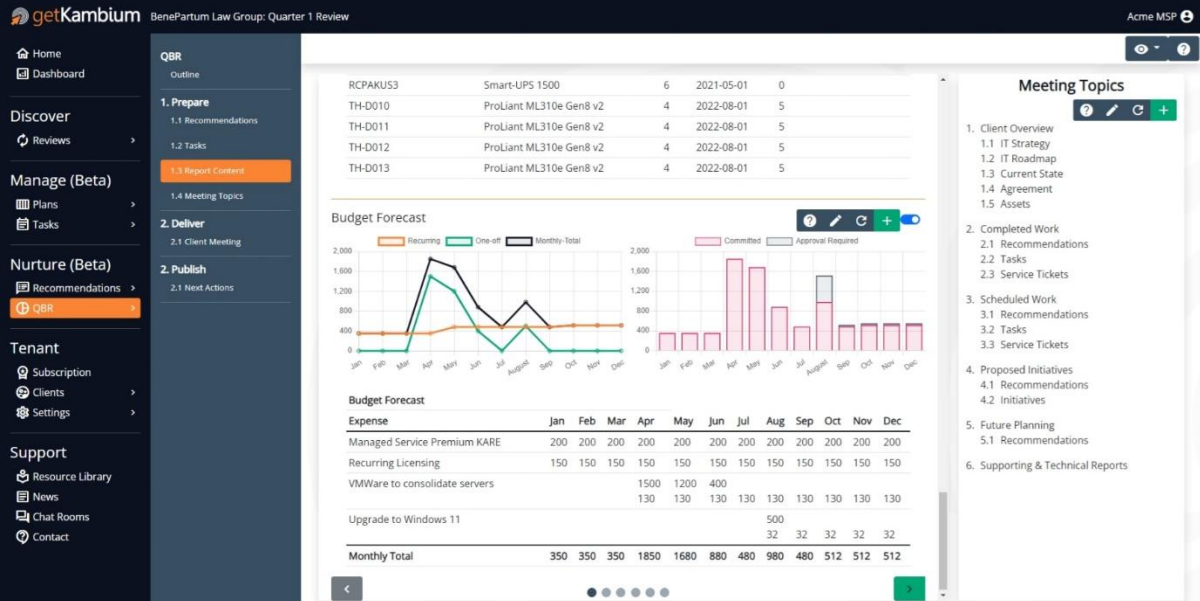
Brings your client's strategic roadmap together so your QBR is a 'check-in' on progress

Lets you include and exclude sections, dynamically refreshing the QBR agenda, and lets you hold QBR templates for large clients, small clients, cloud-only clients or any other client set.

Has purpose to each section and builds minutes and actions to ensure the QBR is more than a 'check-in' – it facilitates client decisions

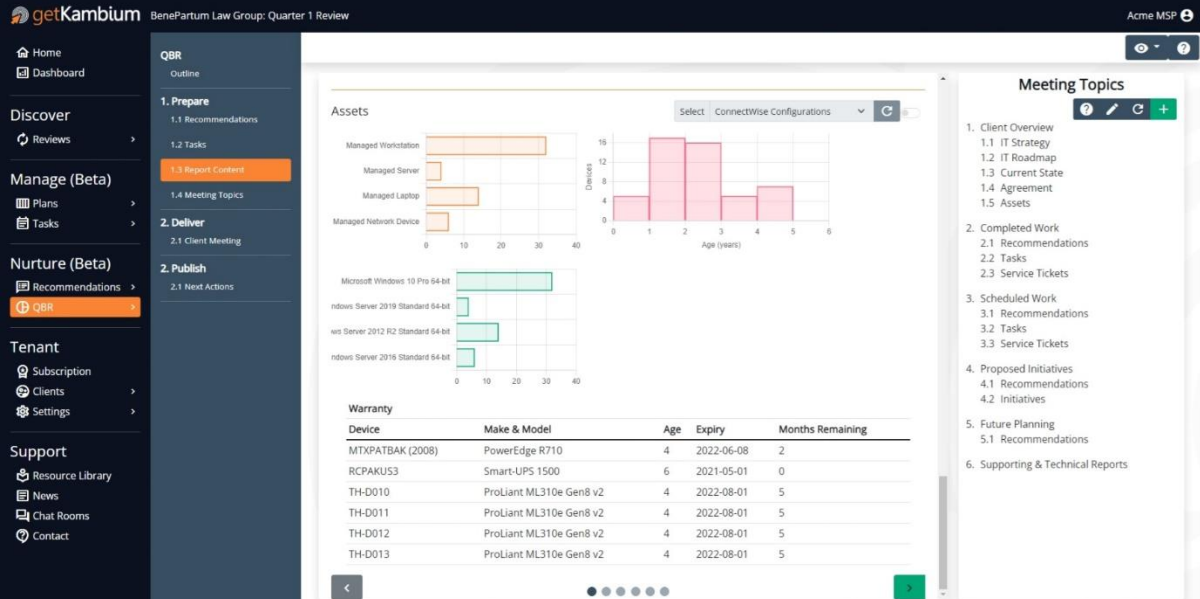
Reviews your sales opportunities with your clients, so they approve your proposals faster

Lets you add your favorite specialist reports from your favorite third party MSP tools



**Budget Forecast**

Expense	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Managed Service Premium KARE	200	200	200	200	200	200	200	200	200	200	200	200
Recurring Licensing	150	150	150	150	150	150	150	150	150	150	150	150
VMWare to consolidate servers				1500	1200	400						
Upgrade to Windows 11				130	130	130	130	130	130	130	130	130
<b>Monthly Total</b>	<b>350</b>	<b>350</b>	<b>350</b>	<b>1850</b>	<b>1680</b>	<b>880</b>	<b>480</b>	<b>980</b>	<b>480</b>	<b>512</b>	<b>512</b>	<b>512</b>



**Assets**

Device	Make & Model	Age	Expiry	Months Remaining
MTXPATBAK (2008)	PowerEdge R710	4	2022-06-08	2
RCPAKU53	Smart-UPS 1500	6	2021-05-01	0
TH-D010	ProLiant ML310e Gen8 v2	4	2022-08-01	5
TH-D011	ProLiant ML310e Gen8 v2	4	2022-08-01	5
TH-D012	ProLiant ML310e Gen8 v2	4	2022-08-01	5
TH-D013	ProLiant ML310e Gen8 v2	4	2022-08-01	5

## Accelerate Sales

Shorten  
sales cycles



Selling is a thousand times easier if your clients want to buy your product or service

The easier way to achieve this is simply to know what they need, why they need it and to present your service in their language.

That means you need to understand your client

You need to have a structured way to discover their needs, that will create and qualify opportunities in your sales pipeline.

GetKambium DISCOVER uncovers their needs, qualifies them and publishes the opportunities into ConnectWise Manage. From a sales discovery for a new prospect to cyber-security or an executive DISCOVERY, you can learn the depth and breadth of your clients' needs and reframe these as a costed road-map, and sales opportunities. You can even create your own DISCOVERY sets with a PREMIUM subscription

Drive your  
revenue  
targets



**Get better insights for higher-value deals**

High-value deals start with high-value conversations.

To successfully elevate the conversations you have with your clients you'll need deep insight into your customers' business needs and challenges.

With Sales Discovery, GetKambium gives you the tools you need to get to grips with your customers' real business drivers, so you can create deals that address your clients' problems and deliver them valuable opportunities.

With GetKambium's Sales Discovery your sales team will be able to demonstrate their credibility and develop qualified leads from customers in less than an hour with just 12 questions.

Try now, for free : <https://getKambium.com>