

Sample Quarterly Business Review

Anonymized mid-market example | Managed IT + vCIO cadence

This document is a realistic sample packet Cybercon would use in a managed IT QBR. Client name, locations, and figures are fictionalized/anonymized composites drawn from typical mid-market engagements. It is provided so buyers can see what decision-oriented reporting looks like - not dashboard tourism.

1. Engagement snapshot

Client (anonymized): Harborline Services Group - multi-site professional services operator, ~145 users across 4 South Florida locations.

Period: Q2 2026 (Apr 1 - Jun 30) Review date: Jul 15, 2026 Prepared by: Cybercon Solutions (Managed IT lead + vCIO)

Attendees (typical): Owner / COO, Finance manager, Office operations lead, Cybercon service lead

2. What changed in the business

- Opened a 5th site in Plantation (12 users) - network and identity onboarding completed May 12.
- Finance migrating AP approvals to a new SaaS workflow in Q3 - needs SSO + conditional access.
- Cyber insurance renewal due Aug 31 - carrier questionnaire requires MFA evidence for all remote access and a documented restore test within 12 months.
- Seasonal volume spike expected August-September; warehouse scanners must stay online during receiving hours.

3. Operating performance (SLA / KPI)

Service levels

P1 response (15 min): Met 100% - 2 P1s this quarter

P1 restore (4 hr): Met 1 / Missed 1 - See incident brief below

P2 response (1 hr): Met 97% - Below 98% target by 1 ticket

P3/P4 resolve (3-5 bd): Met 94% - Aging driven by vendor hold

Business-facing KPIs

Major incidents: 2 - Email auth outage (42 min); scanner VLAN issue (3.5 hr)

Recurring themes: 3 - VPN flakiness; printer mappings; mailbox permissions

Patch compliance: 96% - Target 98% - 7 laptops offline >14 days

EDR healthy coverage: 99% - 1 loaner laptop missing agent - fixed Jul 8

MFA (email + remote): 93% - Vendor accounts still password-only - decision #1

Backup job success: 99.1% - 1 failed job on FILE-02 - remediated

Last restore test: May 28, 2026 - FILE-02 sample restore - success (47 min)

New-hire ready (std): 1.2 days avg - Target <= 1 business day - process tweak

Access revoke (term): Same day - 4 terminations; all SaaS/VPN revoked < 4 hours

4. Major incident briefs

INC-2461 - Microsoft 365 auth degradation (May 3)

Impact: ~80 users unable to sign in for 42 minutes during morning peak. Root cause: tenant conditional access change conflicted with legacy mail client on warehouse floor shared PC. Fix: updated CA policy + replaced legacy client. Prevention: change window + pilot group for identity changes.

INC-2510 - Plantation scanner VLAN mis-route (Jun 18)

Impact: receiving delayed 3.5 hours at new site. Root cause: switch port profile copied from guest VLAN during rushed open. Fix: corrected VLAN + documented port standards. Prevention: site-open checklist item added; dual-tech verification on go-live day.

5. Risk & resilience (ranked)

- HIGH - 11 vendor/contractor accounts still reach VPN without MFA. Insurance renewal will flag this.
- HIGH - Firewall pair at HQ is end-of-support in November 2026; spare parts scarce.
- MEDIUM - FILE-02 is single point of failure for shared department drives; cloud migration scoped but not funded.
- MEDIUM - 7 endpoints offline >14 days (patch/EDR drift). Likely stored/loaner devices.
- LOW - Guest Wi-Fi SSID naming inconsistent across sites; cleanup scheduled in retainer.

6. Roadmap status

Funded / in progress

- Plantation site stabilization - complete
- Identity cleanup (shared admin retirement) - 80% complete; finish by Jul 31
- Backup immutability options review - proposal ready for decision #3

Recommended next (Q3)

- Enforce MFA on all VPN/vendor access before insurance questionnaire (Aug)
- Replace HQ firewall pair (quote attached in appendix for real engagements)
- SSO + conditional access for new AP SaaS

Parked with revisit date

- Full file-server to SharePoint migration - revisit Oct 2026 after AP project settles
- Warehouse handheld refresh - revisit Jan 2027 unless failure rate rises

7. Decisions needed this QBR

These are the point of the meeting. Sample outcomes below show how a real QBR should end - with named owners and dates, not 'we'll look into it.'

Decision A - Vendor / contractor MFA on VPN

Decision: APPROVED - Enforce MFA for all non-employee VPN accounts by Aug 15. Temporary break-glass accounts limited to 2, reviewed monthly.

Owner: Cybercon (impl) / COO (exception approval) Due: Aug 15, 2026 Status: Approved in-meeting

Decision B - HQ firewall replacement window

Decision: APPROVED IN CONCEPT - Fund replacement in FY26 Q3 capital. Change window: Sat Sep 12, 01:00-05:00. Dual ISP failover test included.

Owner: Finance (PO) / Cybercon (cutover) Due: PO by Aug 20; cutover Sep 12 Status: Approved - pending PO

Decision C - FILE-02 resilience spend

Decision: DEFERRED - Keep quarterly restore tests; revisit cloud file migration in October after AP SaaS go-live. Accepted risk documented for insurance file.

Owner: Owner / Cybercon vCIO Due: Revisit Oct 14, 2026 Status: Deferred with date

Decision D - After-hours onsite retainer for peak season

Decision: APPROVED - Add Aug-Sep Saturday onsite window (4 hours) for scanner/network issues at Plantation + HQ. Review necessity in October QBR.

Owner: Operations / Cybercon Due: Coverage starts Aug 1 Status: Approved in-meeting

Decision E - CRM platform replacement RFP

Decision: DECLINED FOR NOW - Not a technology emergency; sales process ownership unclear. Revisit if sales leadership assigns a business owner.

Owner: COO Due: No date until owner named Status: Declined / parked

8. Commercial snapshot

- Users under management: 145 -> 157 after Plantation (billing adjusted June)

- Retainer: per-user managed IT (help desk, monitoring, patching, onsite as scoped)
- Outside-retainer this quarter: Plantation switch/cabling project (closed); firewall hardware quote pending PO
- Renewals inside 180 days: cyber insurance (Aug 31); primary circuit HQ (Oct 15); Microsoft NCE anniversary (Nov 1)

9. Next quarter focus (Q3 draft)

- Close MFA gaps before insurance questionnaire submission
- Execute firewall cutover with measured downtime
- Support AP SaaS SSO without weakening conditional access
- Drive patch compliance to $\geq 98\%$ by retiring/reimaging ghost endpoints
- Keep QBR packet to one decision-ready narrative - continue excluding vanity charts

Want this cadence for your organization?

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Disclaimer: Figures and entity names are anonymized samples for illustration. They do not represent a specific named client engagement.