How to Automate QBRs for an MSP

A practical playbook for automating quarterly business reviews across your managed clients — pull from your PSA and RMM, standardize the format, and get prep under 30 minutes per account.

The short answer

You automate QBRs by treating the review as an output of data you already collect, not a document someone builds from scratch every quarter. The work is in four moves: connect the systems that hold the truth (PSA, RMM, ticketing), define one standard QBR format every client gets, generate the draft automatically from that data on a quarterly trigger, and keep a human in the loop for the fifteen minutes of judgment that actually matter. Done right, prep drops from half a day per client to under 30 minutes, and no account slips off the calendar because nobody had time to build the deck.

That is the outcome Catalyst OS delivers as module M.01 — but the playbook below works whether you build it yourself or have it installed for you.

Why QBRs break down (and it isn't discipline)

Most MSP owners already know QBRs are the single highest-leverage retention and expansion motion they have. A client who sees their risk reduced, their roadmap forward, and the value they're getting renews without a second thought and says yes to the next project. The problem was never knowing that. The problem is that a good QBR takes three to five hours to assemble by hand — pulling ticket counts, chasing down patch compliance, reconstructing the last quarter's wins from memory — and that cost scales linearly with every client you add.

So the math turns against you. At ten clients, quarterly reviews are a stretch. At twenty-five, they quietly become "we'll do the important ones." The accounts that don't get a QBR are the ones most likely to churn, because nobody is in front of them telling the story of the value being delivered. You built a world-class service operation; the review layer that should showcase it is held together with a spreadsheet and whoever has a free afternoon.

Automation fixes the economics. When the deck builds itself, the cost per QBR is flat no matter how many clients you run — and the motion that drives renewals and expansion stops being the thing you skip when you're busy.

The playbook: 7 steps to automated QBRs

Step 1 — Decide what a QBR actually needs to say

Before any tooling, lock the content. A QBR that drives renewals answers four questions for the client, in their language, not yours:

- **Are we safe?** Security posture, patch and backup status, incidents handled, risks closed this quarter.
- **Are we getting value?** Tickets resolved, response and resolution times, uptime, projects delivered.
- **What's next?** The forward roadmap — what you recommend over the next two to four quarters and why.
- **What does it cost to stay ahead?** The budget conversation, framed as risk reduction, not line items.

If you can't name the eight to twelve data points that answer those questions, you're not ready to automate — you're ready to standardize. Do that first.

Step 2 — Standardize one format for every client

Automation cannot follow a snowflake. The single biggest unlock is deciding that every client gets the same QBR structure, populated with their data. Same sections, same order, same visual language. Bespoke decks per account are why QBRs don't scale; a standard template that auto-fills is why they do. You lose nothing the client cares about — they want their story told clearly, not a unique layout.

Step 3 — Connect the systems that hold the truth

Your QBR data already exists across three systems:

- **PSA (ConnectWise, Halo PSA, Autotask):** tickets, time, agreements, projects, SLAs.
- **RMM (NinjaOne, Datto RMM, Atera):** device health, patch compliance, backup status, alerts.
- **Security/compliance tooling:** posture scores, vulnerabilities, incidents.

Pulling these together is the technical core of QBR automation. Most teams try to do it by hand each quarter; the automated version reads the APIs once, on a schedule, and assembles the numbers without anyone exporting a CSV. (For the mechanics of joining PSA and RMM data specifically, see the companion guide on unifying ConnectWise and NinjaOne data.)

Step 4 — Translate data into business language

Raw metrics don't renew contracts — a story does. "847 tickets resolved, 99.98% uptime, 100% backup success" means nothing to an owner-operator until it reads as "your team never lost a day's work this quarter, and every issue was handled before it cost you." The automation layer's real job is this translation: turning system output into plain-language talking points and a health score the client understands at a glance. Hard-coded metrics are easy; the narrative is the differentiator.

Step 5 — Generate the draft on a quarterly trigger

Set the calendar logic once: every account on a quarterly cycle, staggered so reviews don't all land in the same week. When an account comes due, the draft generates automatically — populated, formatted, and ready. Nobody starts from a blank page. The system's default state is "every client's QBR is prepared before you sit down," whether you got to it or not.

Step 6 — Keep a human in the 15 minutes that matter

Automation builds the draft; it does not replace your judgment. The vCIO or account owner spends fifteen to twenty minutes reviewing each generated QBR: sanity-checking the numbers, sharpening the roadmap recommendations, and adding the one or two account-specific insights only a human who knows the relationship can add. That's the right division of labor — the machine does the assembly, you do the strategy. This is also your quality gate; it's how the format stays trustworthy.

Step 7 — Close the loop on the roadmap

The forward roadmap in each QBR is a list of recommendations. Track which ones the client accepts and feed that back in. Over a few quarters you build a record of what you proposed, what they bought, and what's still open — which makes the next QBR sharper and turns the review into your most reliable expansion pipeline.

Build vs. install: an honest comparison

	Build it in-house	Spreadsheet + templates	Install the operating layer
Time to first automated QBR	3–6 months of dev	Live now, but still manual	Within 30 days
Prep time per client	Low once built	2–4 hours	Under 30 minutes
Engineering cost	A developer's roadmap	None	None — delivered as a managed service
Maintenance when an API changes	Yours to fix	N/A	Handled for you
Scales past 25 clients	If you built it well	No	Yes

Building it yourself is viable if you have engineering capacity sitting idle and a tolerance for maintaining integrations every time a vendor changes an API. Most owner-led MSPs don't — their technical people are billable on client work, and a QBR-automation side project competes with revenue. That's the gap

Catalyst OS fills: the QBR module is the operating layer that runs this workflow on your existing data, installed for you and delivered as a managed service, so your team stays on client work.

What "good" looks like 90 days in

- Every managed client is on a quarterly QBR cycle, staggered across the calendar.
- Prep time per client is under 30 minutes, and it's review time, not build time.
- No account is silently skipped because the quarter got busy.
- Your renewal conversations open from a position of demonstrated value, not a scramble.
- The roadmap section is generating a visible expansion pipeline.

That's the operating layer doing its job: the review motion runs whether you're paying attention or not, and your team's hours go to the work clients pay for.

Frequently asked questions

What is QBR automation for an MSP?

QBR automation is the practice of generating quarterly business reviews directly from the data in your PSA, RMM, and ticketing systems, instead of building each review by hand. The system pulls device health, ticket performance, security posture, and project status on a quarterly trigger, translates it into plain business language with a health score and forward roadmap, and produces a ready-to-review draft — taking prep from hours per client to under 30 minutes.

How long does it take to set up automated QBRs?

With the right data connections in place, an MSP can deliver its first automated QBR within about 30 days. The bulk of the work is connecting the PSA and RMM and standardizing one QBR format; once that's done, every subsequent review generates on schedule with no additional setup.

Do automated QBRs replace the vCIO?

No. Automation handles the assembly — pulling data, formatting, and drafting talking points — which is the time-consuming part. The vCIO or account owner still reviews each QBR, sharpens the roadmap, and leads the client conversation. The goal is to remove the busywork so the strategic role has time to scale across every client.

Which systems do I need to connect?

At minimum, your PSA (ConnectWise, Halo PSA, or Autotask) and your RMM (NinjaOne, Datto, or Atera). Adding security and compliance tooling makes the "are we safe?" section stronger. Automated

QBRs read from the systems you already run — no rip-and-replace.

How much does QBR automation cost?

See the dedicated pricing explanation, "What does MSP QBR automation cost?" Catalyst OS publishes its pricing: a one-time setup fee to install and configure the module plus a fixed monthly subscription to run it, delivered as a managed service.

Catalyst OS is the business-layer operating system for an MSP — the layer the major MSP vendors have no incentive to build. QBR Automation (M.01) is the first module. The first conversation is a 30-minute listen, not a pitch.
