



BUSINESS OVERVIEW
Overall recommendation progress for Goals and Challenges

BUSINESS GOALS

- Learn Navigation | Test | edit
- Expand the business by 50% | edit
- Optimize workplace efficiency | edit
- Identify Security Roles | edit
- Risk Determination | edit
- MSP Agreement | edit

BUSINESS CHALLENGES

- IMA Transition Issues | edit
- Risk Determination | edit

IT GOALS

- Modernize Technology | edit
- Define Resilience Requirements | edit
- MSP Agreement | edit
- Improve Security Posture | edit
- Identify Security Roles | edit
- Define Resilience Requirements | edit
- Risk Determination | edit

ROAD MAP

CDI Headstart

Install MSP Agreement
Assign unique 3rd party credentials
Risk Determination

FORECAST

Recommendations	January	February	March	April	May	June	July	August	September	October	November	December
Install Compliant Firewall												\$1,500.00
Totals:												\$3,500.00
MSP Agreement		\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00
Identify Security Roles												
Define Resilience Requirements												
Assign unique 3rd party credentials								\$2,000.00				
Risk Determination												
Totals:	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$4,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00

OnPoint Platform

QBR Workflow Companion Guide

A Step-by-Step Process to help you build your first QBR

Step 1: Activate your client



1. Set filter to "Inactive", or
2. Search by Name
3. Press "Activate" button

The screenshot shows the VCI Toolbox interface with a list of customers. The filter is set to "Inactive". The search bar is empty. The "Activate" button for the third customer, "1st Alliance Lending", is highlighted with a red box and the number 3.

Name	State	Address	City	State / Province	Zip Code	Country	Phone	Business Insights Complete	Email	External Source	Actions
<u>00000ZZZZZ</u>	Inactive	q	w	AK	44444	United States	2	false	1		📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>1 Solution Telecom</u>	Inactive	198 Lawn ave	Stamford	CT	06902			false		connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>1st Alliance Lending</u>	Inactive	111 Fouders Plaza	CT		06108		8602890332	false		connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>3030 PARK</u>	Inactive	FAIRFIELD HEALTH CENTER 118 JEFFERSON STREET	FAIRFIELD	CT	06825		20337456117e+01	true	bdoyle+3030@vciotoolbox.com	connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>4SURE.COM</u>	Inactive	74 ROBINSON blvd	ORANGE	CT	06477	United States	2037955350	true	bdoyle+42120@vciotoolbox.com	connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>A Duie Pyle Companies</u>	Inactive	87 Aircraft Rd	Southington	CT	06489		8887803567	true	jpassante@gmail.com	connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>A Plus Telecom</u>	Inactive	5 Laurel Dr	Flanders	NJ	07836		18888916212	false		connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>A&D Home Health Solutions</u>	Inactive	27 Garfield Street	Newington	CT	06111	United States		true	dfisher@adhomehealthsolutions.com	connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>A. Duie Pyle Companies</u>	Inactive	PO Box 564	West Chester	PA	19381		61069658003014	true	bdoyle@vciotoolbox.com	connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>A1 Facilities Management</u>	Inactive	11 Terrace View	Bedford	TX	76021	United States	555-555-5557	false	bdoyle@metathinq.com	autotask	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>Aaron Associates</u>	Inactive	478 West Main Street	Waterbury	CT	06702		2037531536	false		connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>AB Commercial Services, Inc</u>	Inactive	1165 Providence Rd	Springfield	PA	19064		6105433637	false		connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>ABB Inc</u>	Inactive	131 Phoenix Crossing	Bloomfield	CT	06002		8609695301	false		connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>ABC Cable</u>	Inactive	14 Gilbert Street	West Haven	CT	06516		2039324854	false		connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>ABCD, Inc.</u>	Inactive	1070 Park Avenue	Bridgeport	CT	06604		2033668241	false		connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>ABF Freight</u>	Inactive	56 Carlson Road	Orange	CT				false		connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐
<u>ABF Freight System Inc</u>	Inactive	220 Terminal Lane	New Haven	CT	06519		2037872305	false		connectwise	📅 ⬆️ Activate 🗑️ ⚙️ ⭐

Step 2: Add your Templates



1. From the Customer Detail, click "Templates"

The screenshot shows the VCIOToolbox interface for a customer named 4SURE.COM. The 'Templates' tab is highlighted with an orange box and a '1' in a circle. The page displays customer details, a list of assets, and a comments section.

Customer Information:

- Name:** 4SURE.COM
- Description:**
- Address:** 74 ROBINSON blvd
- City:** ORANGE
- State / Province:** CT
- Zip Code:** 06477
- Country:** United States

Contact Information:

- Contact Name:** 4SURE Unknown
- Phone:** 2037955350
- Ticket Originator:**
- URL:**
- Business Insights Complete:** true
- External Source:** connectwise
- Last Sync Date:** 14 Jul 2021
- Email:** bdoyle+42120@vciotoolbox.com
- External ID:** 26181

Assets (49):

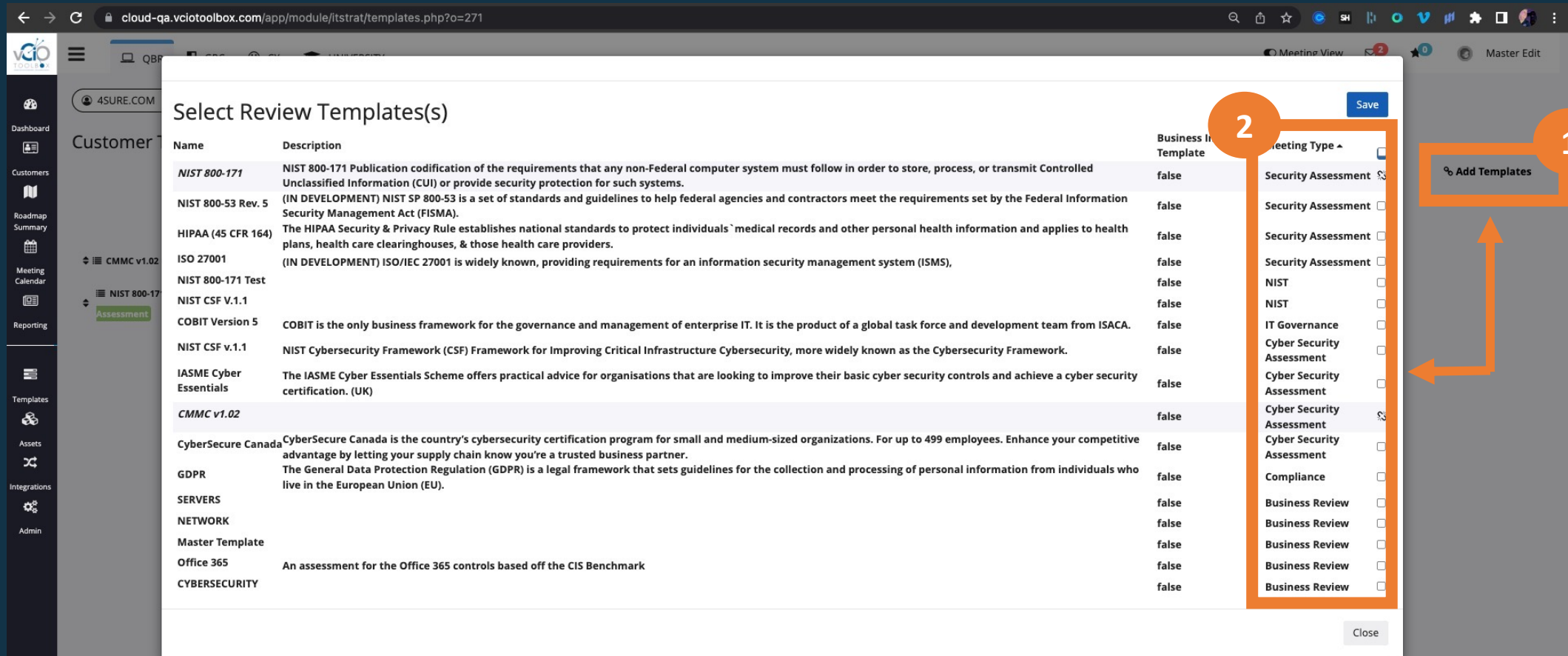
- Test 4/21/2020 Test 4/21/2020 Windows 10 01 Apr 2023 8 250 SSD
- ASA5500 Cisco IOS 01 May 2020 0 0
- C9200-24T Cisco IOS 30 Apr 2021 0 0
- Domain Controller Hewlett Packard Windows 2012 01 Jul 2018 8 1000 SCSI
- File Server Hewlett-Packard Windows 2008 01 Jul 2021 8 500 SCSI
- Laptop 1 Asus Windows 7 02 Jul 2020 4 250 SATA
- SQL Server Hewlett Packard Windows 2016 03 Jul 2022 12 3000 SSD
- Ubiquiti 24 port switch Ubiquiti IOS 01 May 2022 0 0
- Workstation 1 Hewlett Packard Windows 10 01 Jun 2025 8 250 SATA
- Workstation 2 Lenovo Windows 10 01 Jun 2024 8 250 SSD
- Workstation 3a Lenovo Windows 8 01 Jun 2023 6 500 SATA

Comments:

comment...

Step 3: Choose your template set

1. Click "Add Templates" on the right
2. Choose your templates using the multi-select tools

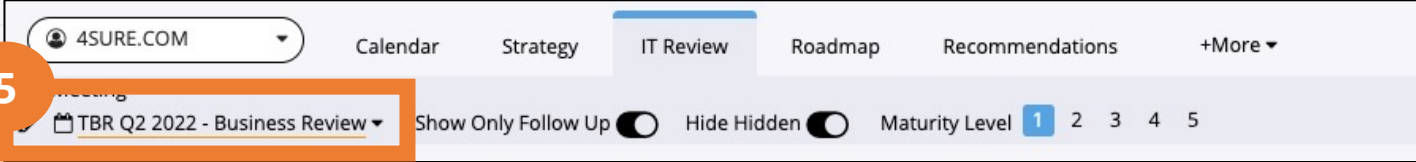
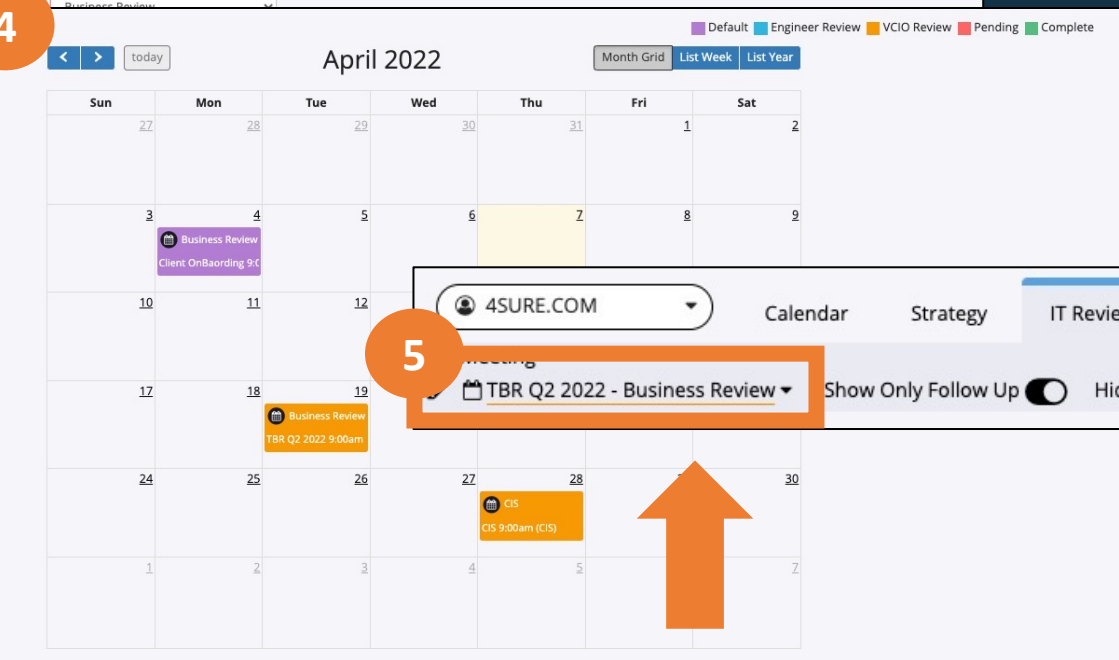
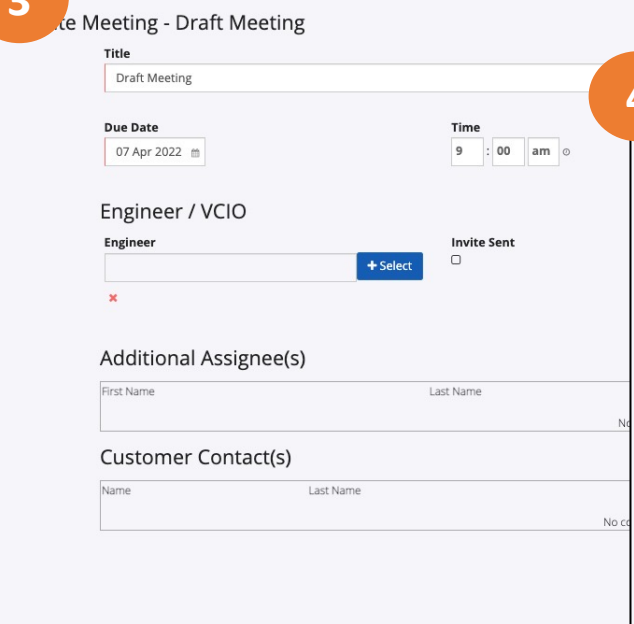
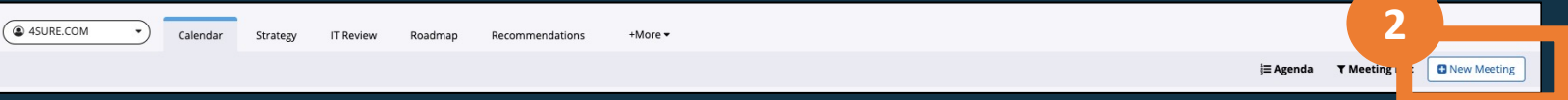
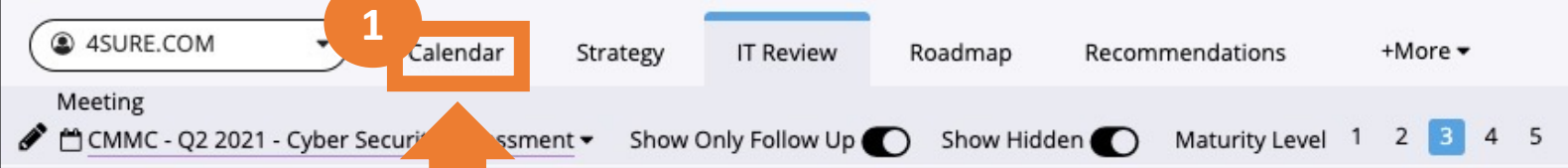


The screenshot displays the 'Select Review Templates(s)' modal window. The table contains the following data:

Name	Description	Business In Template	Meeting Type
NIST 800-171	NIST 800-171 Publication codification of the requirements that any non-Federal computer system must follow in order to store, process, or transmit Controlled Unclassified Information (CUI) or provide security protection for such systems.	false	Security Assessment
NIST 800-53 Rev. 5	(IN DEVELOPMENT) NIST SP 800-53 is a set of standards and guidelines to help federal agencies and contractors meet the requirements set by the Federal Information Security Management Act (FISMA).	false	Security Assessment
HIPAA (45 CFR 164)	The HIPAA Security & Privacy Rule establishes national standards to protect individuals' medical records and other personal health information and applies to health plans, health care clearinghouses, & those health care providers.	false	Security Assessment
ISO 27001	(IN DEVELOPMENT) ISO/IEC 27001 is widely known, providing requirements for an information security management system (ISMS).	false	Security Assessment
NIST 800-171 Test		false	NIST
NIST CSF V.1.1		false	NIST
COBIT Version 5	COBIT is the only business framework for the governance and management of enterprise IT. It is the product of a global task force and development team from ISACA.	false	IT Governance
NIST CSF v.1.1	NIST Cybersecurity Framework (CSF) Framework for Improving Critical Infrastructure Cybersecurity, more widely known as the Cybersecurity Framework.	false	Cyber Security Assessment
IASME Cyber Essentials	The IASME Cyber Essentials Scheme offers practical advice for organisations that are looking to improve their basic cyber security controls and achieve a cyber security certification. (UK)	false	Cyber Security Assessment
CMMC v1.02		false	Cyber Security Assessment
CyberSecure Canada	CyberSecure Canada is the country's cybersecurity certification program for small and medium-sized organizations. For up to 499 employees. Enhance your competitive advantage by letting your supply chain know you're a trusted business partner.	false	Cyber Security Assessment
GDPR	The General Data Protection Regulation (GDPR) is a legal framework that sets guidelines for the collection and processing of personal information from individuals who live in the European Union (EU).	false	Compliance
SERVERS		false	Business Review
NETWORK		false	Business Review
Master Template		false	Business Review
Office 365	An assessment for the Office 365 controls based off the CIS Benchmark	false	Business Review
CYBERSECURITY		false	Business Review

Step 4: Set your meeting

- 1. Add your meeting from the More > Calendar using the + quick link
- 2. Click New Meeting
- 3. Schedule your meeting by naming it and selecting the meeting type.
- 4. Your meeting will be on the calendar, and you can change on that entry
- 5. Before starting your review, select your meeting type.



Step 5: Populate the Client Strategy Dashboard



1. Build your IT Goals as the Leadership Partner and add Business Goals and Challenges if they have been identified.
2. You can add additional entries using the “New Client Strategy” Button

The screenshot displays the Vcio Client Strategy Dashboard for 'UNIVERSITY'. The dashboard includes a sidebar with navigation options like Dashboard, Customers, Roadmap Summary, Meeting Calendar, Reporting, Templates, Assets, Integrations, and Admin. The main content area is divided into several sections:

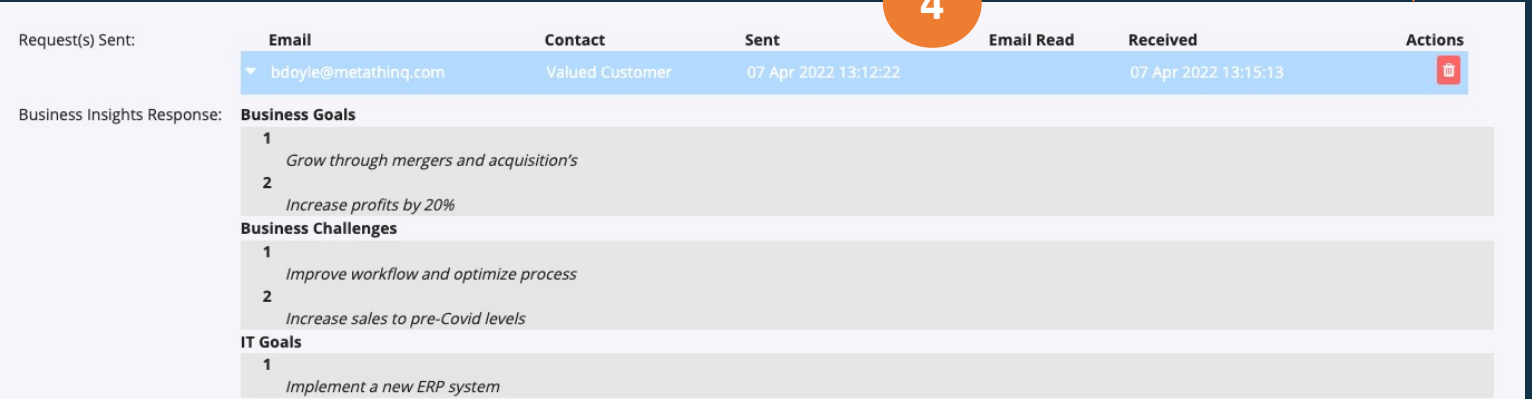
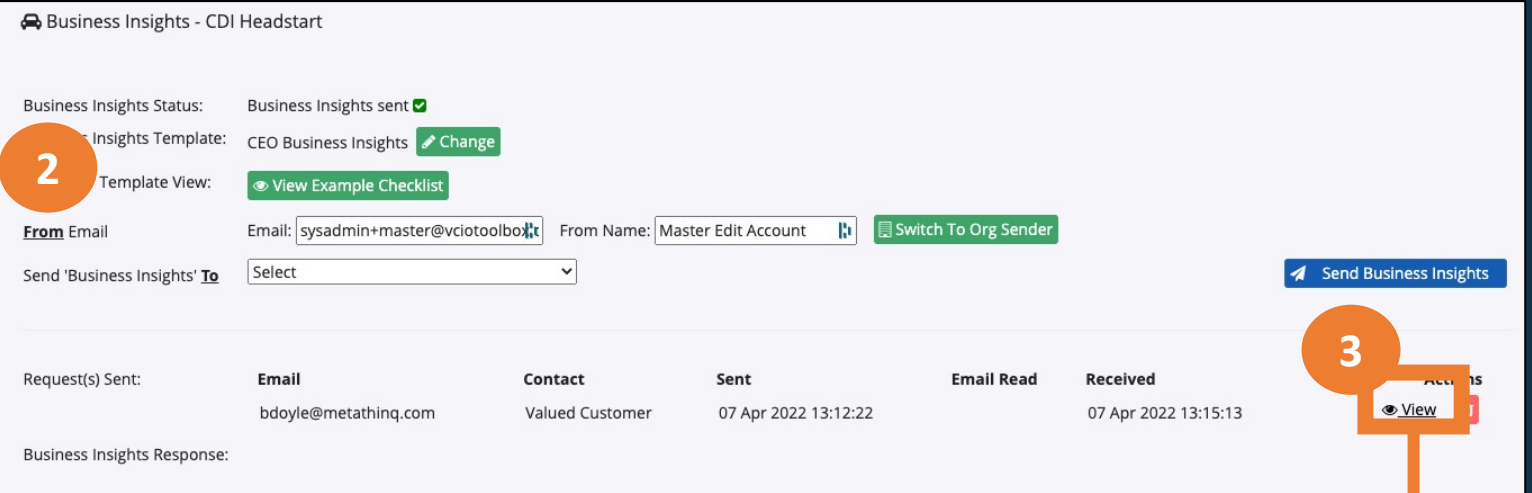
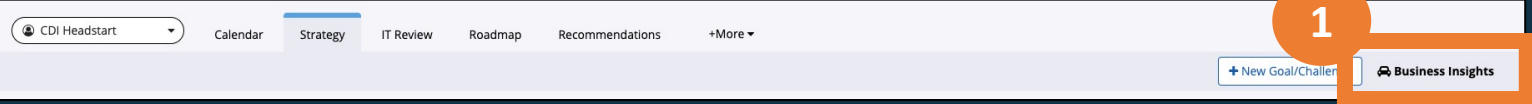
- Progress Metrics:** Four circular progress indicators are shown on the left: 'Progress' at 22%, 'Goals Achieved' at 33%, 'Resolved' at 0%, and 'Goals Achieved' at 20%.
- BUSINESS OVERVIEW:** A section titled 'Overall recommendation progress for Goals and Challenges.' with a progress indicator of 22%.
- BUSINESS GOALS:** A list of goals including 'Learn Navigation', 'Expand the business by 50%', and 'Optimize workplace efficiency', each with sub-items and edit/delete options.
- BUSINESS CHALLENGES:** A list of challenges including 'M&A Transition issues' with sub-items and edit/delete options.
- IT GOALS:** A list of IT goals including 'Modernize Technology' and 'Improve Security Posture', each with sub-items and edit/delete options.

Annotations in the image highlight two key features:

- 1:** A large orange box surrounds the main content area, indicating the primary focus of the dashboard.
- 2:** A smaller orange box highlights the '+ New Goal/Challenge' button in the top right corner, used for adding new entries.

Step 6: Business Insights

- 1. Send your Business Insight Questionnaire from the Strategy Dashboard.
- 2. You can use the default template or change templates using this button
- 3. You can send the pre-meeting questionnaire to multiple resources/
- 4. Responses are captured by user, and you can view each response individually.



The static section of the Business Insights template includes Business Goals, Business Challenges, and IT Goals. These dynamically populate the Client Strategy Dashboard using each response.

Step 7: Conduct your IT Review

1. Navigate to the IT Review.
2. Answer your question. Best Practices/Technical Vulnerability/Business Risks drive the Health Scoring for that question.
3. Create tickets and Recommendations. Align Goals to Recommendations.

Meeting
TBR Q2 2022 - Business Review Show Only Follow Up Show Hidden Maturity Level 1

1. Categories/Topics 99% 1 / 97

- SERVERS 97% Business Review**
- SERVERS - Physical Hardware 94
- Good Credentials - 3rd party
- SERVERS - Operating Systems 100
- SERVERS - Virtualization

NETWORK 100% Business Review

- NETWORK - Wireless Access Points 100
- NETWORK - Network Switches 100
- NETWORK - Firewalls 100
- NETWORK - Cabling Infrastructure 100

Office 365 100% Business Review

- Office 365 Security Account/Authentication Policies 100
- Office 365 Security Application Permissions 100

2. Good Credentials - 3rd party

Do we have working admin credentials to manage this device? Hide Question? 3 1

No

Best Practices: No Technical Vulnerability: No Business Risk: Yes

Engineer Review: Previous Entries CIO Review: Previous Entries

"The Why" - Best Practice:
Authorized 3rd party vendors should have unique access credentials for management and logging.

Reference and Evidence Links: New Link New File

Title	Link
VCIOToolbox Website	https://vciotoolbox.com/

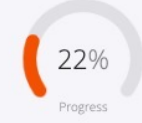
3. Tickets: New Ticket

Summary	Description	Status	Ext. Status	ID			
Recommendations: New Recommendation Add Existing							
Title	Description	Status	Forecast Services/HW/Monthly	Start Date	Due Date	Assets (0)	Goals (0)
Assign unique 3rd party credentials	Assign unique 3rd party credentials and enable logged access for audits.		2000.00 + 0.00 + 0.00 mo.	01 Jul 2022	31 Jul 2022		

Internal Comments: Add Internal Comment

Step 8: Auto-Update Goals and Roadmap

1. The IT Review aligns recommendations to goals/challenges in the strategy board.
2. The recommendations create the technology roadmap
3. They also create a CFO budget plan



BUSINESS OVERVIEW

Overall recommendation progress for Goals and Challenges.

1

BUSINESS GOALS

- 🔗 Learn Navigation | [Test](#) [edit](#) [trash](#)
- 🔗 Expand the business by 50% | [edit](#) [trash](#)
- 🔗 Optimize workplace efficiency | [edit](#) [trash](#)
 - Identify Security Roles [edit](#)
 - Risk Determination [edit](#)
 - MSP Agreement [edit](#)

BUSINESS CHALLENGES

- 🔗 M&A Transition issues | [edit](#) [trash](#)
 - Risk Determination [edit](#)

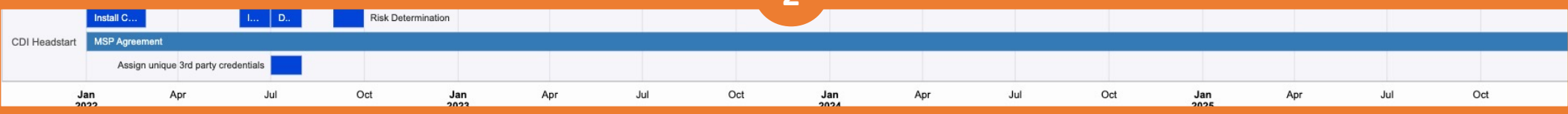
IT GOALS

- 🔗 Modernize Technology | [edit](#) [trash](#)
 - Define Resilience Requirements [edit](#)
 - MSP Agreement [edit](#)
- 🔗 Improve Security Posture | [javascript:](#) [edit](#) [trash](#)
 - Identify Security Roles [edit](#)
 - Define Resilience Requirements [edit](#)
 - Risk Determination [edit](#)

2

INFRASTRUCTURE - SERVERS INFRASTRUCTURE - NETWORK WORKSTATIONS SECURITY CLOUD BACKUP AND DISASTER RECOVERY MANAGED SERVICE/SAAS AGREEMENTS 3rd Party Technology Other

ROAD MAP



3

FORECAST

★ High Priority ● Adopted ○ Pending ❌ Declined 📦 Services 🛒 Hardware/Purchases 📅 Monthly

2022 Recommendations	January	February	March	April	May	June	July	August	September	October	November	December
★ Install Compliant Firewall ●	📅 \$1,500.00 🛒 \$3,500.00											
★ MSP Agreement ●	📅 \$2,200.00	📅 \$2,200.00	📅 \$2,200.00	📅 \$2,200.00	📅 \$2,200.00	📅 \$2,200.00	📅 \$2,200.00	📅 \$2,200.00	📅 \$2,200.00	📅 \$2,200.00	📅 \$2,200.00	📅 \$2,200.00
★ Identify Security Roles ●												
★ Define Resilience Requirements ○												
Assign unique 3rd party credentials ○							📅 \$2,000.00					
★ Risk Determination ○												
Totals:	\$7,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$4,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00	\$2,200.00

📅 \$0.00
📅 \$33,400.00

Recommendation Timeline - Road Map - Open & In Progress (5)

01 Jun 2022 - 30 Jun 2022
Identify Security Roles
 SECURITY
 Created: 05 Apr 2022
 Updated: 07 Apr 2022

1

Assign resources for your company's security team Priority: High
 \$0.00 \$0.00 \$0.00/month Total: \$0
 Goal/Challenge:
 Optimize workplace efficiency (Business Goal)
 Modernize Technology (IT Goal)

Adopt:

2

Define the resilience requirements that are required to support your c
 \$0.00 \$0.00 \$0.00/month Total: \$0
 Goal/Challenge:
 Improve Security Posture (IT Goal)
 Modernize Technology (IT Goal)

Adopt:

Step 9: (Generally only after initial Meeting) Update Recommendations

1. Customer Acceptance of recommendations can be done using the approval button. Declines are tacked as well.
2. When projects are completed, you can update their status using the complete button.
3. Approvals are dynamically noted on the Technology Roadmap and Client Strategy Dashboard.
4. Completed projects also populate the Client Strategy Dashboard increasing the progress scores.

BUSINESS OVERVIEW
 Overall recommendation progress for Goals and Challenges.

22% Progress

33% Goals Achieved

0% Resolved

20% Goals Achieved

BUSINESS GOALS

- Learn Navigation | Test | edit | trash
- Expand the business by 50% | edit | trash
- Optimize workplace efficiency | edit | trash
- Identify Security Roles | edit | trash
- Risk Determination | edit | trash
- MSP Agreement | edit | trash

BUSINESS CHALLENGES

- M&A Transition issues | edit | trash
- Risk Determination | edit | trash

IT GOALS

- Modernize Technology | edit | trash
 - Define Resilience Requirements | edit | trash
 - MSP Agreement | edit | trash
- Improve Security Posture | javascript:; | edit | trash
 - Identify Security Roles | edit | trash
 - Define Resilience Requirements | edit | trash
 - Risk Determination | edit | trash

4

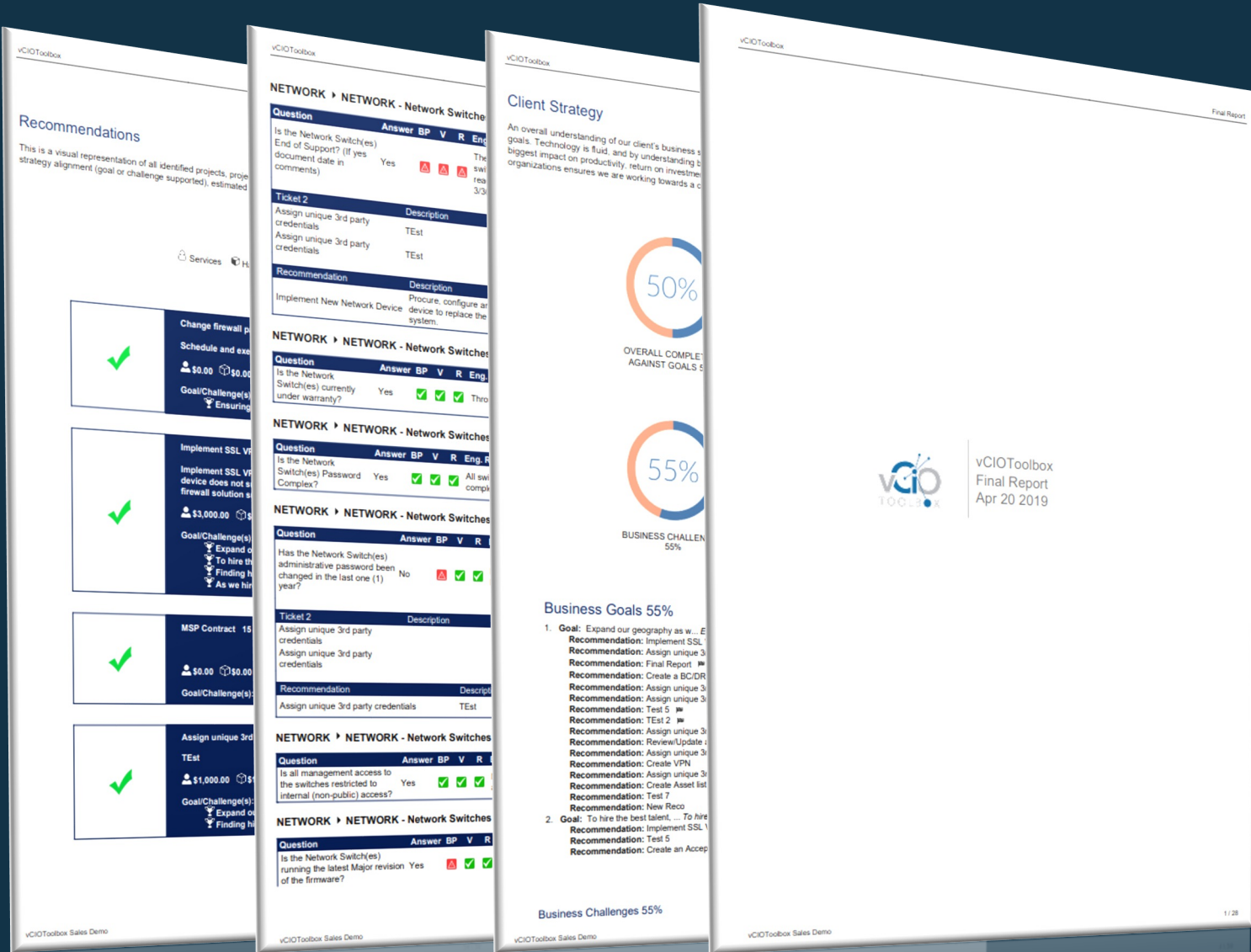
ROAD MAP

Activity	Jan 2022	Apr	Jul	Oct	Jan 2023	Apr
Install C...						
CDI Headstart						
MSP Agreement						
Assign unique 3rd party credentials						
Risk Determination						

FORECAST

Recommendations	January	February	March
Install Compliant Firewall	\$1,500.00 \$3,500.00		
MSP Agreement	\$2,200.00	\$2,200.00	\$2,200.00
Define Resilience Requirements			
Assign unique 3rd party credentials			
Risk Determination			
Totals:	\$7,200.00	\$2,200.00	\$2,200.00

3



Step 10: Generate your Reports

1. Use one of the pre-built reports or use the Report Designer to create your own



CONNECTING THE DOTS BETWEEN IT AND BUSINESS STRATEGY