



**CHARTING A COURSE:  
NAVIGATING  
BUDGETING  
WITH YOUR  
MSP CLIENTS**

**NOVEMBER 1, 2023**

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# WHO ARE WE?

## Alex Farling

- Co-Founder at Empath
- Co-Founder, Lifecycle Insights, Exited in 2023
- 20+ years in MSP industry
- Expertise in vCIO and Account Manager optimization
- MSP Channel Advisor & Angel Investor



## Kyle Christensen

- Co-Founder at Sierra Pacific Group, Exited 2022
- \$0-\$5M ARR, 30% EBITDA, from 2019-2022
- 18+ Years in MSP Industry
- Turned around 2 MSPs
- >70+ FTEs, \$10M Growth, and 18% EBITDA combined
- Former Certified EOS and Pinnacle Business Coach w/ 250+ logged sessions in MSP
- MSP Channel Advisor





**WE'RE MOVING THE  
SHOW TO CROWDCAST!**

<https://www.crowdcast.io/c/eitr>





**HOW DOES THE TYPICAL MSP ENTER A CLIENT-MEETING?**



**HOW?**



**“KNOCK KNOCK - I NEED MONEY!...”**



**“KNOCK KNOCK - I NEED MONEY!...”**



HOW DOES THE  
TYPICAL MSP  
ENTER A CLIENT  
MEETING?



"KNOCK KNOCK -  
I NEED MONEY!"



"KNOCK KNOCK -  
I NEED MONEY!"



# INTRODUCTION

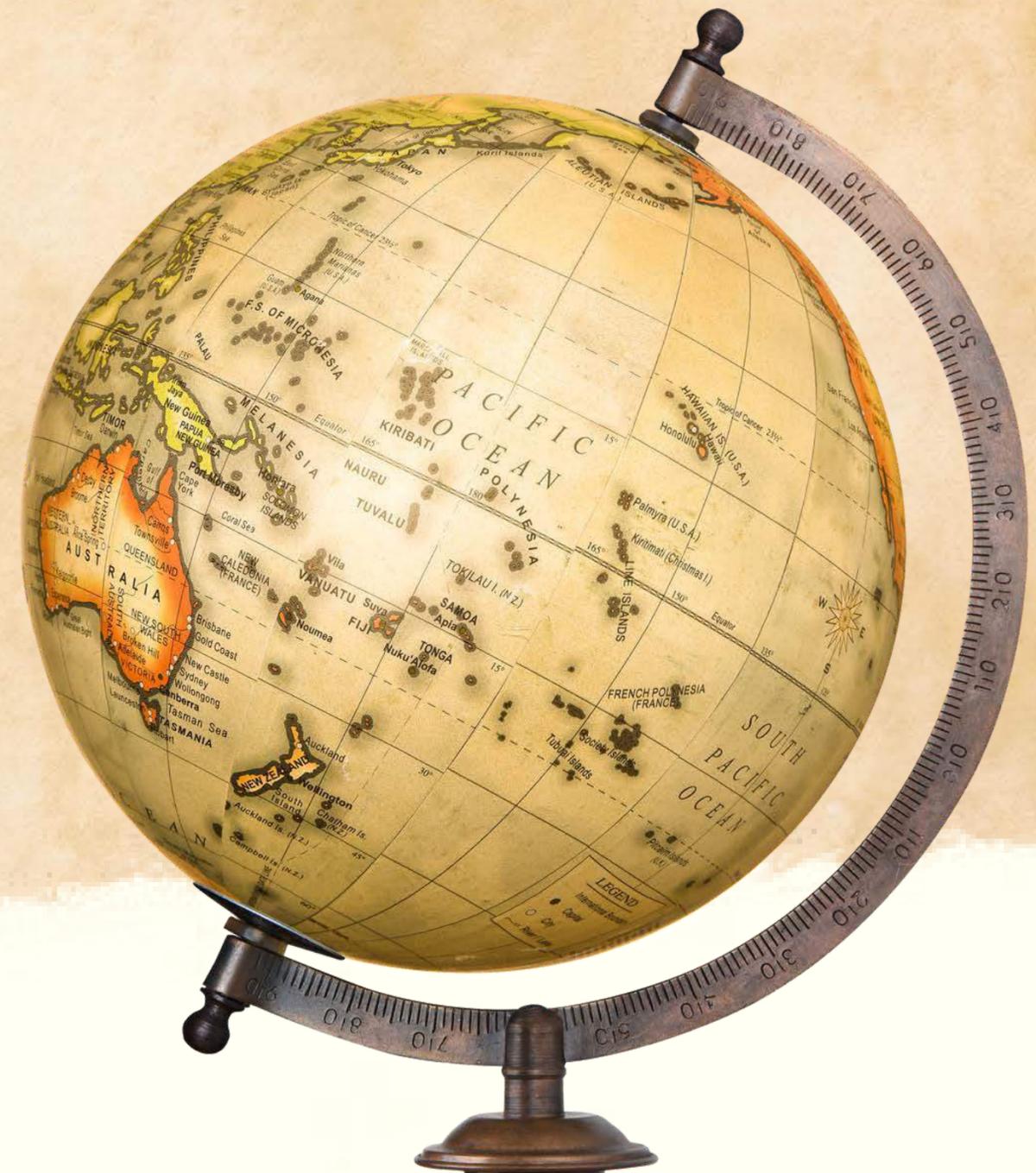
- Client budgeting removes surprises
- MSPs who plan expenses in advance make 2x more product margins (Service Leadership)
- Budgets help address the “MSP Cycle of Unpopularity”



# WIIFM?

## *What's In It For Me?*

- Learn what a good budget looks like
- Learn how to have the budget conversation
- Build a scalable, repeatable process that can be delegated
- Increase product and project gross margins (Service Leadership)
- Address the cycle of unpopularity & remove surprises



**"EXPENSES  
GET CUT.  
BUDGETS DO  
NOT."**

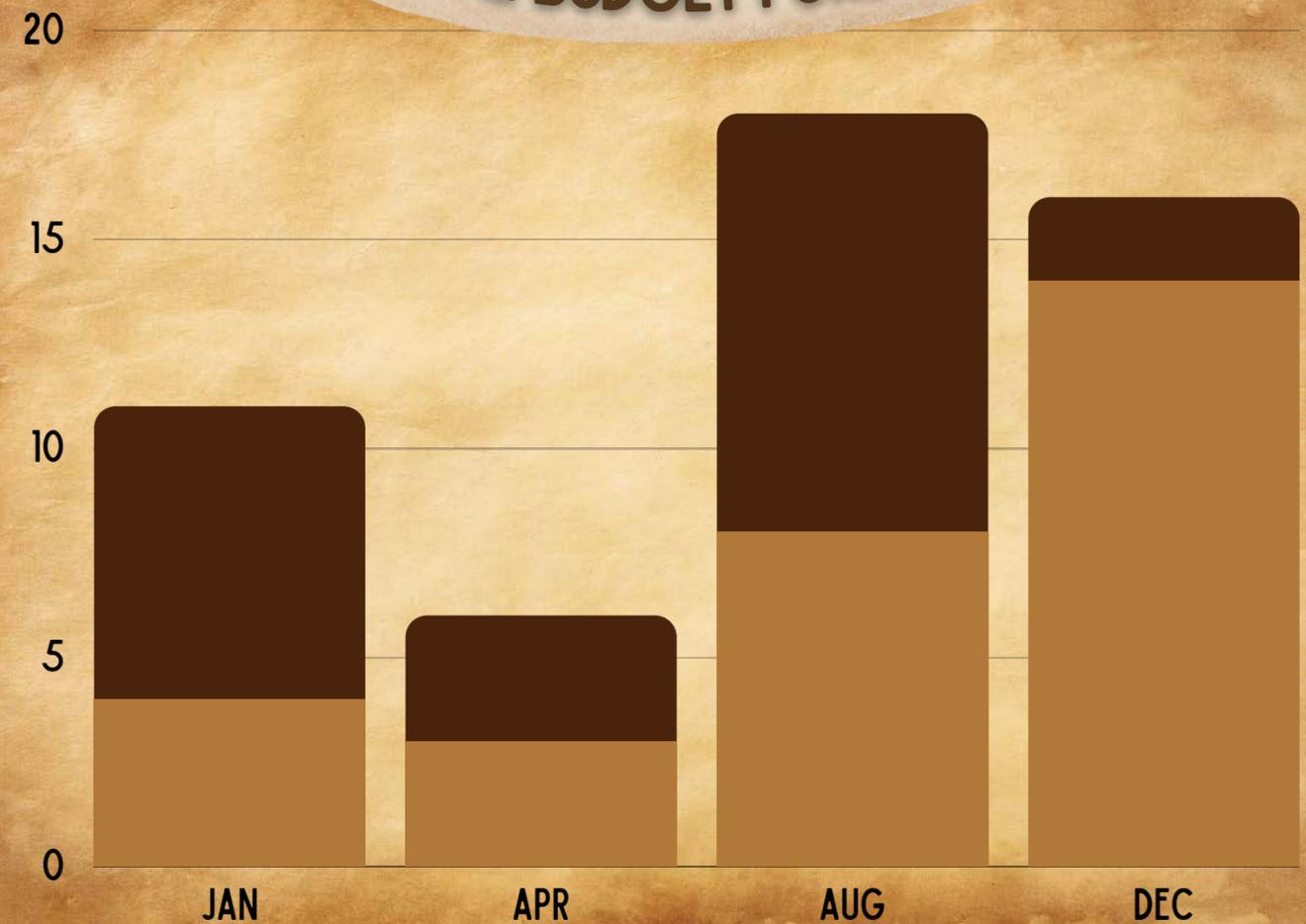
**- CHRIS WISER**



# WHAT'S IN A GOOD TECH BUDGET?

- Hardware Assets (*CIS Control 1*)
- Software Licensing & Vendor Contracts (*CIS Controls 2 & 15*)
- Client Goals
- Recommendations

ANNUAL BUDGET FORECAST



# 5 CRITICAL QBR COMPONENTS

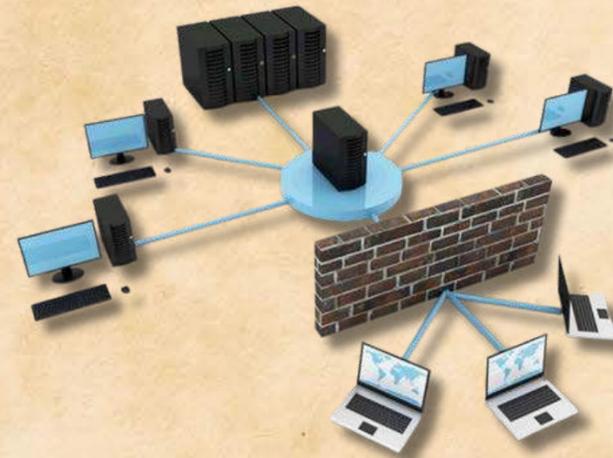
1. **Agenda**
2. **Status Quo**
3. **Budget**
4. **Recommendations**
5. **Client Goals**



# WINDOWS DEVICES



# NETWORK GEAR



# PRINTERS

# VENDOR CONTRACTS LICENSING

# BATTERY BACKUPS



# YOUR CONTRACTS SHOULD BE TRACKING:

*LoB Application Vendors*

*Copier Guy*

*Equipment Leases*

*VoIP & Telco Agreements*

*Internet & Data Circuits*

*Cloud (Azure, AWS, Google Cloud, etc.)*

*Data Destruction (Shred & E-Waste)*

*Web Hosting & Certificates*

*Firewalls, Switches & Wireless Support  
& Maintenance*

*Cameras, Door Access, HVAC, & other  
IoT*

*IT Training & SAT Subscriptions*

*Cyber Liability Insurance*



WHY ME?

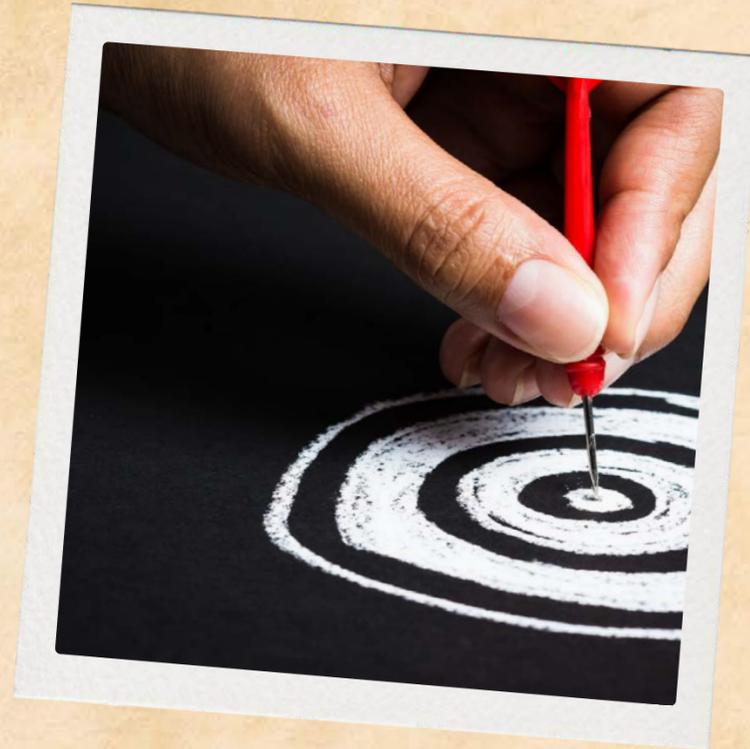
NOBODY ELSE IS  
QUALIFIED!



# HOW DO WE GET THEM TO PARTICIPATE?



GUESS  
WRONG



ASK  
FORGIVENESS  
AND  
OFFER  
ACCURACY



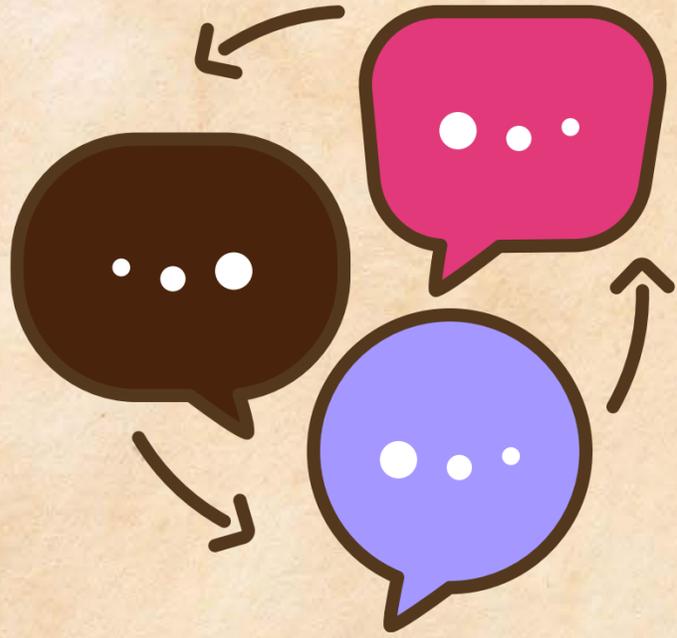
REMOVE  
~~AVOID~~  
SURPRISES



WHAT IF MY CLIENT  
WON'T PARTICIPATE?

FAKE INFO - EGO MAY  
GET THEM TO FIX IT!



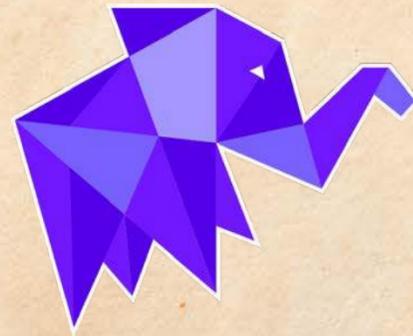


GOT ANY QUESTIONS,  
COMMENTS, STUFF TO  
SHARE WITH US?

SHOOT IT! LET'S DISCUSS!



INTERESTED IN DIVING DEEPER  
INTO BUDGET FORECASTING?  
JOIN EMPATH!

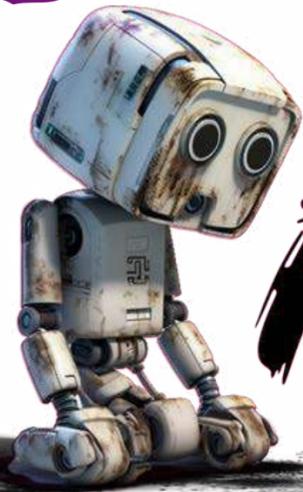


empath

SCAN NOW TO  
SCHEDULE A DEMO!



**Join the Revolution:  
Giving a voice to the rejected  
Doing good for our communities  
Sharing Unspoken MSP Stories**



**REJECTION CON  
'23**

**Speakers:  
Submit your  
rejected talks**

<https://rejectioncon.com/awesome>

**Attendees:  
Register & raise  
money for charity**

<https://www.crowdcast.io/c/rejectioncon>

THANK YOU ALL  
FOR ATTENDING!

 **empath**  
<https://www.empathmsp.com/>

