

Workbook



Foreword by **Nigel Moore** of The Tech Tribe

LITERALLY THE BOOK ON CUSTOMER SUCCESS FOR MSPs



Marnie Stockman, Ed.D.



Notes



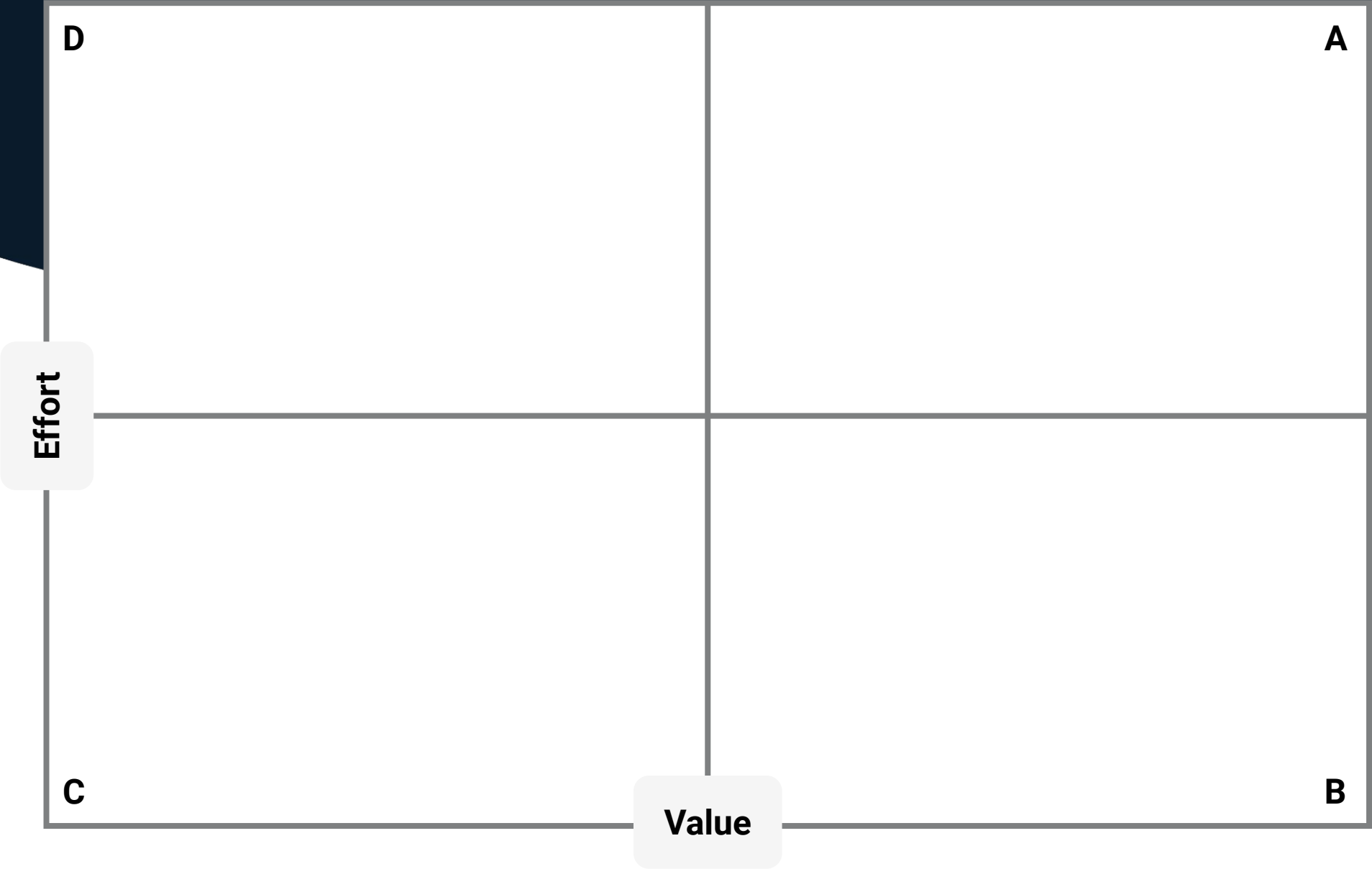
Variable Worksheet

Value	Complexity
<p data-bbox="898 1079 1199 1128">Scoring Guide</p> <div data-bbox="184 1209 942 1333"><p data-bbox="205 1209 342 1252">Lowest</p><p data-bbox="751 1209 888 1252">Highest</p></div> <div data-bbox="1125 1209 1883 1333"><p data-bbox="1146 1209 1283 1252">Lowest</p><p data-bbox="1690 1209 1827 1252">Highest</p></div>	

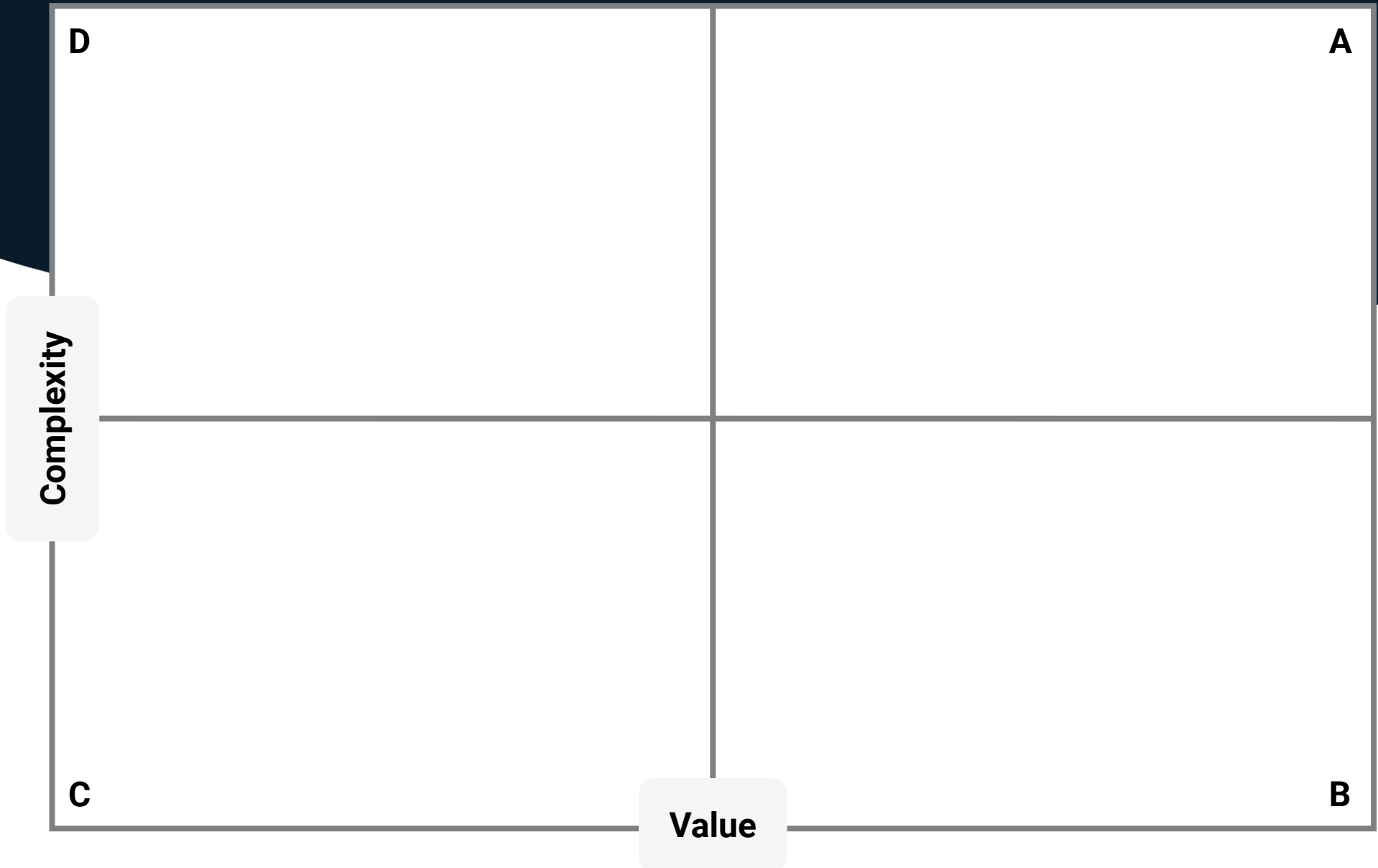
Customer Segments

Customer	Value	Complexity	Segment

Segmentation Worksheet



Segmentation Quadrants Cadence



Customer Health Worksheet

Metric	Low	High	Manual/Auto	Location

Customer Health Worksheet

Metric	Low	High

Customer Health Worksheet

Client	Health Metrics	Average	Health	Segment



Stack Builder

	Solution	Product	Vendor
1	Firewall		
2	Switching		
3	Wireless		
4	Intrusion Detection and Prevention		
5	Email Hosting		
6	Email Encryption		
7	Email Archiving		
8	Email Protection/Filtering		
9	Email Signature Management		
10	DNS Content Filtering		
11	Cloud Filter Services (SharePoint/Anchor...)		
12	Cloud Services Backup (MS365/Google)		
13	Antivirus (Traditional)		

Stack Builder

	Solution	Product	Vendor
14	Antimalware (NextGen)		
15	Cybersecurity (Managed Soc)		
16	Zero Trust		
17	Privileged Access Management (PAM)		
18	Workstation/Server Encryption		
19	Backup & Disaster Recovery		
20	Endpoint/Workstation Backup		
21	Data Loss Prevention (DLP)		
22	Mobile Device Encryption		
23	Cloud Directory Services		
24	VPN/Remote Access		
25	Multi-factor Authentication		
26	Password Manager		

Stack Builder

	Solution	Product	Vendor
27	Secure Scan/Fax		
28	SIEM/Event Log Monitoring		
29	Third Party Audit/Pen Testing		
30	Dark Web Monitoring		
31	Social Engineering/Phishing		
32	Employee Cyber Training		
33	VOIP		
34	Print Management		
35	Website Hosting/Management		
36	Vendor Risk Management		
37	Internet Service Provider		
38	Redundant Internet		