



Internal Business Reviews

Syllabus

Updated: April 2026

Workshop Overview

This workshop is designed to help participants evaluate their organization's performance over the past and set strategic goals for the future.

The workshop will cover key areas such as financial trends, performance efficiency, client satisfaction, growth and employee engagement. Participants will learn how to analyze data, identify trends and understand the importance of getting curious and expecting cleanup in financials.

The workshop will also focus on assessing whether the goals set were accomplished and what lessons were learned from both successes and failures. Through interactive discussions and practical exercises, participants will create helpful lists to evaluate their current position, plan for the future and set the most critical goals to achieve business success.

This training is designed for:

- **MSP Owners**
- **MSP Leaders**

Workshop Inclusions

- **2-hours of virtual, interactive content taught by an expert instructor with MSP expertise**
- **Downloadable videos* of the content you can watch on-demand at your convenience**
- **Downloadable slide decks, handouts and resources**

Learning Objectives

Partners attending this training will learn how to:

- **Understand the four areas of a review and reset**
- **Start a cadence for business reviews**
- **Put tools into action for internal business reviews**

* Videos will either be recordings from your session or previously recorded material in which partner faces and voices have been removed. It is recommended to attend trainings live to receive the full benefits of interactive Q&A with the instructor and class participants.

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Meet the Instructor



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