

AI EXPANSION QBR FRAMEWORK FOR MSPS

Turn account reviews into recurring AI revenue systems.

Traditional QBRs review what happened. AI Expansion QBRs convert account insight into decisions, owners, dates, and recurring revenue action.

DECISION / OWNER / DATE

The operating rhythm that turns QBR discussion into expansion motion.



**COMMERCIAL
READINESS**



**AI SERVICE
UTILIZATION**



**EXPANSION
MAPPING**



**RECURRING
AI REVENUE**

01 FROM REPORTING MEETING TO REVENUE SYSTEM

Most QBR guidance is useful but generic: review performance, discuss goals, align stakeholders, and document action items. Scaletics makes the QBR specific to packaged AI services and expansion revenue.

Traditional QBR

- Reviews account history
- Reports tickets, projects, and activity
- Discusses roadmap in broad terms
- Leaves follow-through to memory
- Creates weak connection to AI revenue

AI Expansion QBR

- Identifies AI expansion triggers
- Connects usage, value, and commercial next steps
- Prioritizes specific account opportunities
- Ends every section with Decision / Owner / Date
- Turns QBRs into recurring AI revenue motion

Differentiation

The Scaletics wedge is not another QBR template. It is a commercial operating framework for MSPs that need to package, position, track, and expand AI services across existing accounts.

Core message

Stop reviewing accounts. Start operationalizing expansion.

02 THE 6-PART AI EXPANSION QBR FRAMEWORK

Use this as the repeatable agenda for turning account reviews into owned expansion action.

1 Commercial Readiness Snapshot

Align on business priorities, AI maturity, operational readiness, and revenue goals.

- Business priorities
- AI initiative status
- Revenue goals

2 AI Service Utilization Review

Evaluate adoption, usage, support patterns, and efficiency of current AI services.

- Tool adoption
- Usage and automation
- Support patterns

3 Expansion Opportunity Mapping

Identify attach-rate opportunities, workflow gaps, expansion triggers, and renewal leverage.

- Attach-rate opportunities
- Workflow gaps
- Renewal leverage

4 Recurring AI Revenue Tracking

Track AI ARR, attach rate, expansion pipeline, and QBR-sourced opportunities.

- AI attach rate
- AI ARR
- QBR-sourced opps

5 AI Commercialization Review

Validate offer clarity, pricing logic, seller confidence, and support boundaries.

- Packaging clarity
- Pricing logic
- Support boundaries

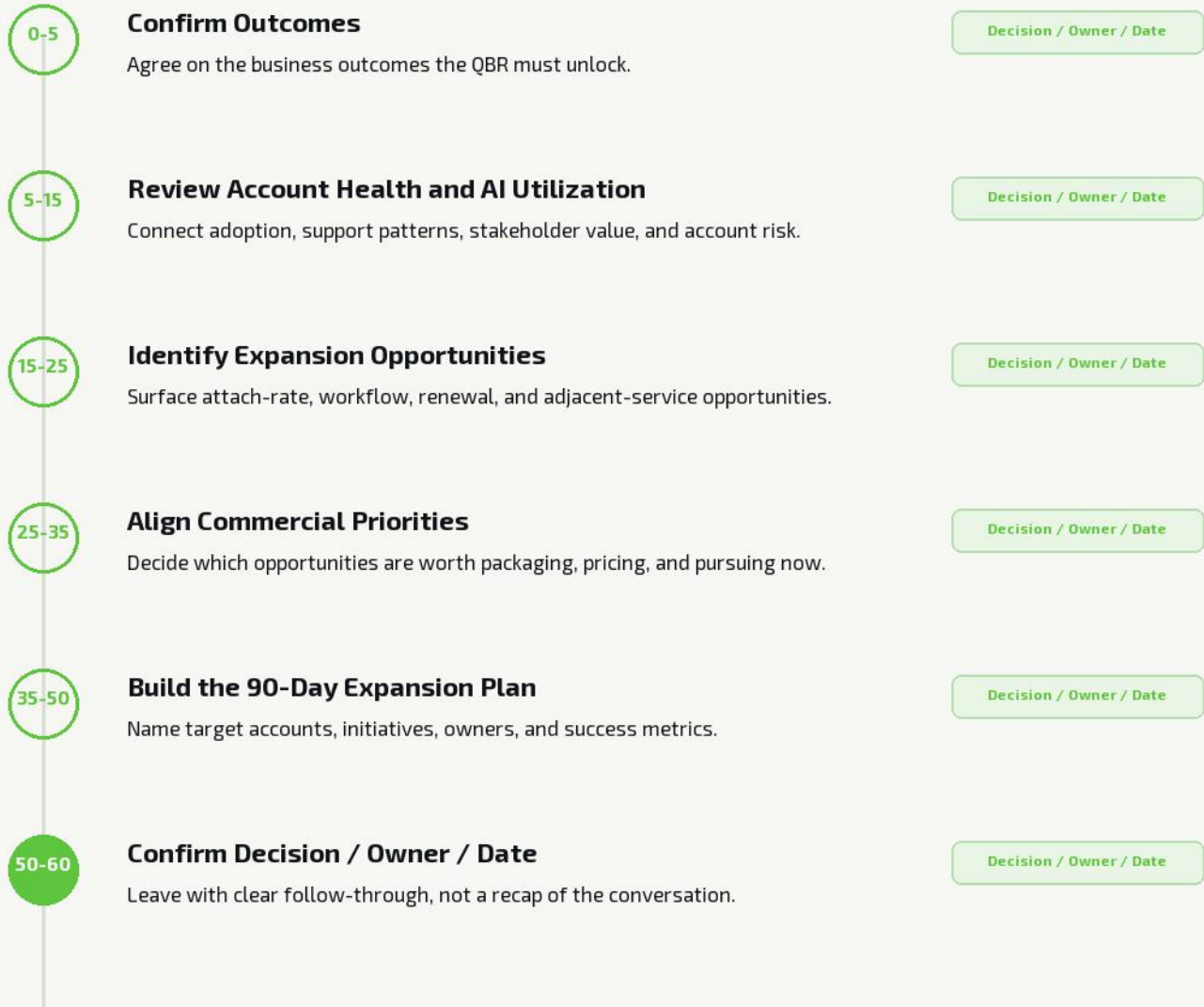
6 90-Day AI Expansion Plan

Convert insights into owned actions, target accounts, success metrics, and a clear timeline.

- Target accounts
- Owners and dates
- Success metrics

03 60-MINUTE AI EXPANSION QBR RUN OF SHOW

The meeting should feel less like a report readout and more like an operating review. Each block should end with a decision, owner, and date.



Meeting standard

If a QBR section does not create a decision, owner, date, or measurable next step, it is probably reporting rather than expansion operations.

04 AI EXPANSION QBR WORKSHEET

Use this page during prep or live facilitation. The goal is to make expansion visible enough to prioritize and operationalize.

AI Expansion Scorecard

AI utilization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workflow fit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stakeholder pull	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expansion readiness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Renewal leverage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Opportunity Map

Account	Trigger	Offer	Next step

Decision Log

Decision	Owner	Date	Success metric

Facilitator prompt

 What would make this account more valuable, stickier, easier to support, or more automated in the next 90 days?


05 90-DAY AI EXPANSION PLAN

The best QBR output is not a slide deck. It is a short plan with accountable next steps that can be reviewed before the next account conversation.

<p>1 Days 1-30</p> <h3>Package and Prioritize</h3> <ul style="list-style-type: none">• Confirm target accounts• Validate offer fit• Set commercial hypothesis	<p>2 Days 31-60</p> <h3>Activate and Measure</h3> <ul style="list-style-type: none">• Equip sellers• Launch account motions• Track attach-rate signals	<p>3 Days 61-90</p> <h3>Expand and Systemize</h3> <ul style="list-style-type: none">• Review pipeline• Tune support boundaries• Create renewal expansion path
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What You Get

<h3>AI Expansion QBR Scorecard</h3> <p>Measure readiness, attach-rate potential, and commercialization maturity.</p> <h3>QBR Executive Narrative</h3> <p>Turn AI usage into business outcomes and ROI conversation.</p>	<h3>AI Expansion Opportunity Map</h3> <p>Visualize expansion paths, adjacent services, and revenue potential.</p> <h3>AI Revenue Expansion Plan</h3> <p>90-day plan with priorities, ownership, and metrics.</p>
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Build QBRs that drive predictable, recurring AI revenue.

Scaletics helps MSPs package, position, and operationalize AI services so account reviews become a repeatable engine for attach rate, renewal expansion, and long-term customer value.

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