

The MSP Playbook

7 Moves to Grow, Automate & Monetize

The State of Managed Services



The global managed services market is expected to reach **\$410 billion by 2027**, growing at a CAGR of **13.6% from 2023 to 2027** (MarketsandMarkets, 2024).

As digital transformation accelerates, small to mid-sized businesses (SMBs) and enterprises alike are outsourcing IT functions to trusted MSPs, seeking flexibility, cost predictability, and always-on support.

The State of Managed Services



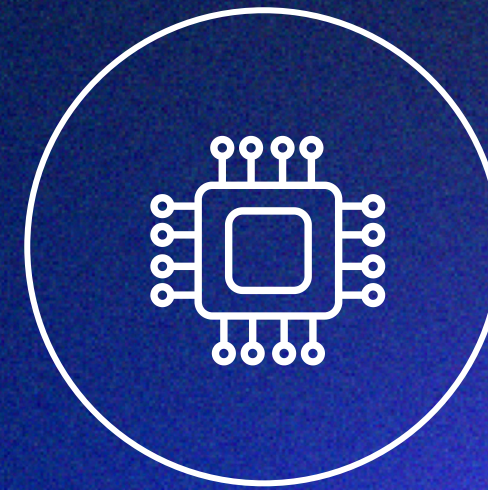
Cybersecurity and Compliance

With ransomware attacks increasing by 37% YoY (Sophos, 2025), SMBs are demanding always-on protection, zero trust frameworks, and compliance-readiness services.



AI & Automation

Over 61% of businesses now expect their MSP to offer AI-powered solutions, including predictive analytics and workflow automation (CompTIA, 2025).



Cloud Optimization & FinOps

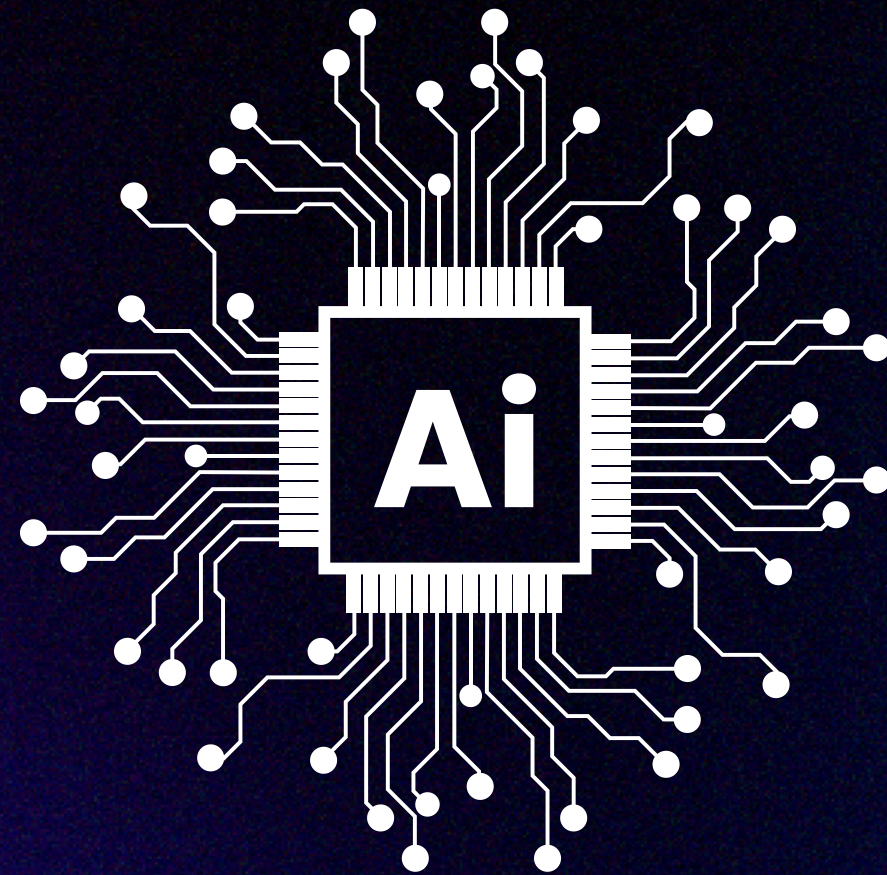
With 87% of companies using multi-cloud environments (Flexera, 2025), MSPs are expected to manage cloud spend and performance.



Industry-Specific Compliance & Support

Legal, healthcare, and finance clients are demanding MSPs that understand HIPAA, GDPR, and FINRA.

The State of Managed Services



Impact of AI/ML on Managed Service Models:

AI is redefining managed services. Predictive maintenance, AI-based helpdesk triage, and RPA-led onboarding reduce service costs by up to 40% and accelerate ticket resolution by up to 70% (Gartner, 2025).

However, MSPs must modernize their tools and processes to keep up with client expectations.

7 Strategic Moves to Scale and Monetize

Leverage Automation

Start with 3 quick wins:

Client onboarding: Auto-create accounts, configure backups, and assign documentation using tools like IT Glue or Liongard.

Ticketing workflows: Use PSA automation to triage and escalate issues.

Renewals: Use CRM triggers to send renewal alerts and auto-quote via PandaDoc.

1

Productize Services

Move from time-based billing to packaged offerings. Define bronze, silver, and gold bundles with outcomes, SLAs, and pricing. Example: A cybersecurity bundle that includes MDR, endpoint protection, compliance scans, and monthly reporting.

2

3

Create Vertical-Specific Offers

Specialize by industry. Healthcare MSPs can include HIPAA-compliant email archiving, EHR support, and endpoint encryption. Legal firms may need case management integrations and DLP (data loss prevention).

7 Strategic Moves to Scale and Monetize



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7

Develop a GTM Engine

Build an engine that delivers leads consistently:

A/B-tested landing pages
Educational **webinars** and **whitepapers**
LinkedIn and **email** drip campaigns
CRM-enabled lead scoring and routing



AI Readiness Checklist

Is your MSP AI-ready? Use this quick checklist:

- ✅ Do you have real-time visibility into your SLAs, ticket resolution, and NOC alerts?
- ✅ Are your Tier 1 support tickets structured enough for AI-based triage or chatbot resolution?
- ✅ Can you track and analyze customer churn by behavior and ticket sentiment?
- ✅ Are your operational tools integrated to enable closed-loop automation?
- ✅ Do you use or plan to use RPA or AI-driven patching and system health checks?

If you're missing 2 or more of these, you may be losing revenue and efficiency.



Improving Clinical Decision-Making

1

Enhanced Insights

AI algorithms can analyze vast amounts of patient data, uncovering hidden patterns and trends to inform clinical decisions.

2

Faster Diagnostics

AI-powered tools can help doctors quickly identify potential issues, leading to faster diagnoses and treatment plans.

3

Improved Collaboration

AI can facilitate better communication and collaboration among healthcare professionals, ensuring optimal patient care.

The MSP Monetization Canvas

SAMPLE

Category	Item	Notes
Service Catalog	Managed Detection & Response (MDR)	High margin recurring service
Service Catalog	Cloud Backup & DRaaS	Common base offering
Pricing Tiers	Silver - Essentials	Core offering for SMBs
Pricing Tiers	Gold - Full Service + CISO Access	Premium offering with added value
Upsell Paths	Monitoring ➡ Full Security Suite	Common upgrade within 90 days
Upsell Paths	Basic Cloud Support ➡ Cloud Optimization	Increases MRR per client by 30%
Retention Risks	Clients without onboarding automation	High churn within 6 months
Retention Risks	Clients with only reactive support	Lower CSAT scores
Cross-Sell Opportunities	Security ➡ Compliance & Audit	Adds consulting revenue stream
Cross-Sell Opportunities	Network Mgmt ➡ VoIP	Upsell potential within same org
Partner Leverage	Pax8 for SaaS bundling	Improves offering breadth
Partner Leverage	CrowdStrike for advanced endpoint	Fills security gap & boosts trust

Case Study: Growing 3x in 18 Months

Company: Telco B2B Business (with only ~\$2M Managed Services contribution to ~\$800M business)
Connectivity Subscriber Size: ~300,000 lines
Challenge: Stagnant MRR, high churn, and no SLA/business outcome differentiation

Approach with DBX MSP System:

- Introduced vertical-specific bundles (banking/finance, retail, SMBs)
- Implemented full onboarding automation and QBR automation
- Launched lead-gen campaigns with content marketing and gated downloads

Results:

- Grew managed services ARR 3X to ~\$6M in the first 18 months
- Reduced connectivity churn by 50%
- Client CSAT increased by 10 percentage points
- Closed deals covering more than 2,000 managed endpoints within the first 12 months

Ready to transform your MSP this year?

👉 Book Your **Free 1:1 DBX MSP Growth Audit**

Get personalized insights, a diagnostic of your service monetization potential, and actionable recommendations.

🔗 **Schedule Your Audit:** <https://www.3RiversGlobal.com/book-a-consultation/>

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✉ Transform@DBX.3RiversGlobal.com | ☎ +1 (415) 729 2491