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MSP & VCISO

Every client's security basics, on one board BETA

Posture & pipeline: see who needs attention, then price the work.

A portfolio tab in the MSP Portal, beside Clients and Insights. Four security basics, **Identity, Endpoints, Patching and Incidents**, read for every client from its own tools or its own finalised assessments, and the clients that need attention listed first. Then, for each of those clients, a remediation project priced at your own rates, ready to send as a statement of work. Rules decide every reading and every price: no AI is used.

The board. Each bar shares the clients out as bad, warning, good or no data, and each segment filters the list. Below, the clients that need attention, most in need first. Illustrative data.

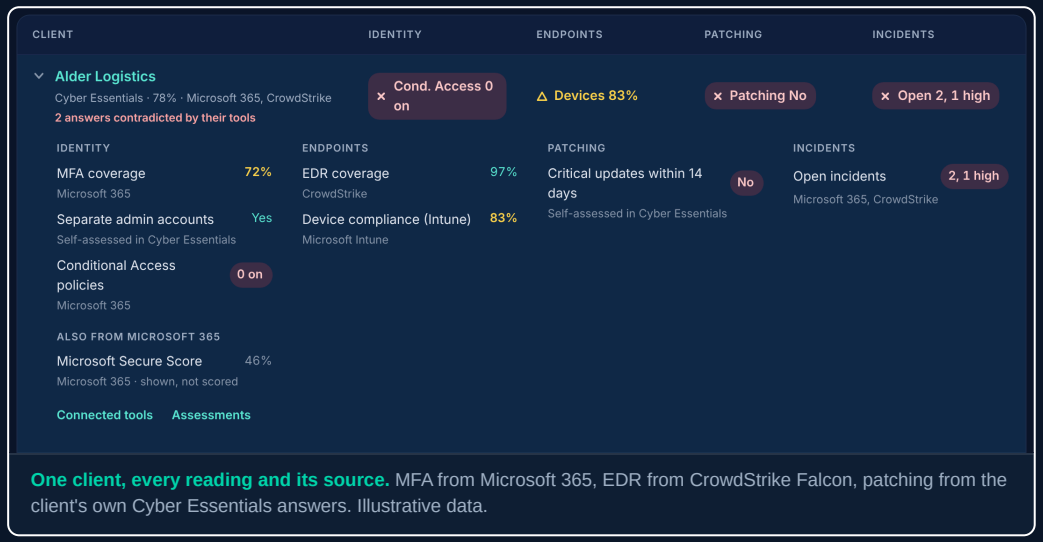
WHERE EACH READING COMES FROM

- **A connected tool first:** Microsoft 365, Google Workspace, Okta or CrowdStrike Falcon. Microsoft 365 and Google Workspace count only once a sign-in has tied them to the client's own organisation.
- **Otherwise the client's own answer** in its latest finalised assessment of a framework that asks the question.
- **Every reading names its source,** and a tool reading over 30 days old is shown in grey. Microsoft Secure Score is listed but never scored.

WHO NEEDS ATTENTION

- **A warning or a bad reading** on any of the four basics.
- **Answers its own tools contradict:** the client said it was in place, and its tools show otherwise.
- **An assessment over 90 days old.**

Check it, then quote on it. Select a client to see every reading and its source, with links to its connected tools and assessments.



One client, every reading and its source. MFA from Microsoft 365, EDR from CrowdStrike Falcon, patching from the client's own Cyber Essentials answers. Illustrative data.

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PROJECTS TO PRICE

From what the board shows to a signed statement of work

One remediation project for each client that needs attention, priced in days at your rates.

PIPELINE **£32,580.00** your fees across 4 projects, before VAT

To price	Proposed	Won
£18,980.00 · 2	£5,100.00 · 1	£8,500.00 · 1

To price · Proposed · Won Select a stage to see its projects

Harbourline IT · Your rates · £850.00 a day · leading 2 days a month · new policy 1 day · update ½ day · board report ½ day a month · margin on subcontracts 10% · VAT 20%

Change

The pipeline. Your fees across every project by stage, before VAT, with lost projects counted beside it; each stage filters the list. Below it, the rates the portfolio owner sets. Illustrative data.

The work

The client's open Remediation Tracker actions in a package for each basic, and the policies each weak basic calls for.

Your fees

Leading the work each month, each policy and a monthly board report, in days at your day rate.

Who delivers

The client's own team, or Pro Services from a printed request for quote; a partner MSP's quote is subcontracted.

The statement

Numbered, priced on the server from its own rates and quotes, and kept at that price.

Alder Logistics

Cyber Essentials · 78% · Microsoft 365, CrowdStrike

Identity × Cond. Access 0 on Endpoints △ Devices 83%

Patching × Patching No Incidents × Open 2, 1 high

Open incidents: 2, 1 high (Microsoft 365, CrowdStrike). Deal with a high-severity incident now: it's urgent work, not part of a project.

FROM THE REMEDIATION TRACKER

Work packages

5 open actions Open the tracker

You lead every package: agree owners and dates, then confirm each fix on the board. Choose who delivers each one: the client's own team, or Pro Services from a request for quote.

Patching

1 action · about 1 day of work

Internal team | Pro Services

CRITICAL Cyber Essentials q3_3 Upgrade the three remaining unsupported Windows laptops

IT Support (suggested) Patching

For Pro Services to price: Managed devices in Intune 41. Done when the board reads good from the client's tools and the actions are complete.

Print RFQ-2026-031

Request for quote RFQ-2026-031 sent 17 Oct 2026 · 2 quotes in

- Northgate IT — Your partner MSP · subcontracted by you · £1,800.00 + 10% margin — £1,980.00 ×
- Keystone Networks — Their own MSP · contracted directly — £1,950.00 ×

Add a quote

To price | Proposed | Won | Lost

YOUR FEES

Alder Logistics

No due dates among the actions, so it runs for 3 months.

Months 3 Set

Lead the remediation 3 months × 2 days	6 days
Write new policies 4 × 1 day	4 days
Monthly board report 3 reports × ½ day	1½ days
Pro Services · Patching Northgate IT, subcontracted: £1,800.00 + 10% margin	£1,980.00

11½ days at £850.00 a day, plus £1,980.00 subcontracted

£11,755.00

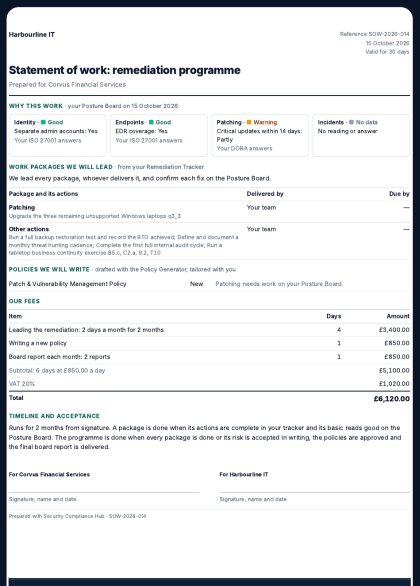
before VAT · £14,106.00 with VAT at 20%

VAT on this statement, % 20 Set

DELIVERY

Internal team · 1 package about 12 days

One client's project. A package priced by Pro Services, two quotes in and one chosen, beside your fees. Illustrative data.



Harbourline IT

Reference SOW-2026-014
15 October 2026
Valid for 30 days

Statement of work: remediation programme

Prepared for Corvus Financial Services

WHY THIS WORK · your Posture Board on 15 October 2026

Identity · Good	Endpoints · Good	Patching · Warning	Incidents · No data
Separate admin accounts: Yes Your ISO 27001 answers	EDR coverage: Yes Your ISO 27001 answers	Critical updates within 14 days: Partly Your DORA answers	No reading or answer

WORK PACKAGES WE WILL LEAD · from your Remediation Tracker

We lead every package, whoever delivers it, and confirm each fix on the Posture Board.

Package and its actions	Delivered by	Due by
Patching Upgrade the three remaining unsupported Windows laptops q3_3	Your team	—
Other actions Run a full backup restoration test and record the RTO achieved; Define and document a monthly threat hunting cadence; Complete the first full internal audit cycle; Run a tabletop business continuity exercise B5.c, C2.a, 9.2, T1.0	Your team	—

POLICIES WE WILL WRITE · drafted with the Policy Generator, tailored with you

Patch & Vulnerability Management Policy	New	Patching needs work on your Posture Board

OUR FEES

Item	Days	Amount
Leading the remediation: 2 days a month for 2 months	4	£3,400.00
Writing a new policy	1	£850.00
Board report each month: 2 reports	1	£850.00
Subtotal: 6 days at £850.00 a day		£5,100.00
VAT 20%		£1,020.00
Total		**£6,120.00**

TIMELINE AND ACCEPTANCE

Runs for 2 months from signature. A package is done when its actions are complete in your tracker and its basic reads good on the Posture Board. The programme is done when every package is done or its risk is accepted in writing, the policies are approved and the final board report is delivered.

For Corvus Financial Services — Signature, name and date

For Harbourline IT — Signature, name and date

Prepared with Security Compliance Hub · SOW-2026-014

The statement of work, as printed. Illustrative data.

- **Why this work:** each basic's reading and its source, from the board.
- **Done means** the actions are complete and the basic reads good on the board.

Requests for quote and statements of work print (Save as PDF) with your business name, and Export CSV writes a project's actions, policies, fee lines and totals. A project moves from to price to proposed, won or lost.

The portfolio owner sets the rates; team members see only their clients, and Viewers change nothing. Posture & pipeline is in beta in the MSP Portal. Screens are the shipped product showing a fictional MSP and its clients; names, readings and prices are illustrative.