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vCIO Is the Glue

- Strong vCIO includes:
 - Roadmaps
 - Compliance
 - AI
 - Scorecards
 - Budgeting
 - Future planning

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Why Most MSP Portfolios Stall

MSPs do not grow because they want to. MSPs grow because they offer the solutions the market needs at the level the market demands.

- Most MSPs think they offer the right services
- When we analyze thousands of MSPs, we see the same pattern:
 - Too much "minimum must-have"
 - Too little "advanced"
 - Almost no "pro" tier services
- Result:** They look and sound just like their competitors

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The Four Growth Pillars

Growth becomes predictable with mastery of:

- Cybersecurity
- AI
- vCIO
- Voice, Print, Internet

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Cybersecurity Is the Gateway to Growth

Clients no longer buy "IT support." They buy risk reduction. Cybersecurity is no longer an add-on. It is the core of how your MSP is perceived and evaluated.

- Most MSPs are still stuck at the **bottom of the pyramid**:
 - Antivirus and basic endpoint protection
 - Patching and updates
 - Basic email filtering
 - Backups and restore
 - MFA
- These are table stakes, not differentiators
- You cannot grow by only selling the minimum layer

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Tier 1 – Minimum Tier

Most MSPs only offer:

- Antivirus
- Patching
- Email filtering
- Backups
- MFA

These do not differentiate you.

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Tier 2 – Highly Recommended (Where the Money Starts)

Sell consistently in this tier:

- EDR / XDR / ADR
- Monthly vulnerability scanning
- Cloud app security
- Firewall with IPS
- Device management and hardening
- Security awareness training
- Cloud hosting and cloud migration
- LOB application support

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Tier 3 – Advanced (Where You Become a Security Company)

Clients entering this layer begin optimizing:

- AI productivity tools
- AI governance & policy
- Cloud cost optimization
- Annual IT policy review & compliance audits

This layer correlates with higher deal size and multi-year planning

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Tier 4 – Pro

This layer supports regulated or fast-scaling environments:

- Zero Trust Architecture
- Full org-wide encryption
- SOC/SIEM with AI threat detection
- Compliance readiness (HIPAA, NIST, CMMC)

This is the highest-margin tier for MSPs

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Why Compliance Sells

Compliance helps clients:

- Reduce risk
- Lower insurance
- Avoid fines
- Protect revenue

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AI is NOT Optional



- AI is SMBs' largest shift
- Clients want leadership
- If you don't lead, someone else will

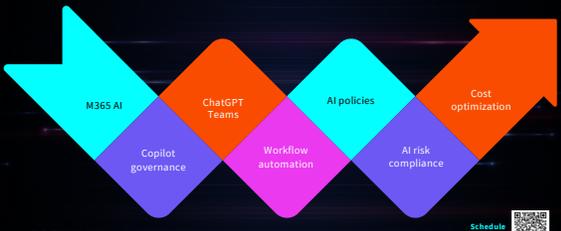
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What Clients Want in AI



M365 AI

Copilot governance

ChatGPT Teams

Workflow automation

AI policies

AI risk compliance

Cost optimization

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Lifecycle Management & Cross-Selling

- Use account management to guide clients upward:
 - Quarterly reviews
 - Solution maturity mapping
 - Road mapping & budget forecasting
 - Project structuring & prioritization
- This creates predictable revenue and client retention



01 Quarterly reviews

02 Solution maturity mapping

03 Road mapping & budget forecasting

04 Project structuring & prioritization

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Building Bundles from the Pyramid



- Create 3-4 bundles:
 - Essential (Minimum Must-Haves)
 - Secure (Highly Recommended)
 - Professional (Advanced)
 - Enterprise/Compliance (Pro)
- Bundles simplify the buying decision and accelerate closes

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Real-World Example Scenarios

Example: Client moves from Minimum → Highly Recommended → Advanced in 18 months

- Adds EDR, cloud hosting, MFA
- Then adds AI governance and annual audits
- This increases annual revenue and reduces service burden



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Common Mistakes MSPs Make



- Selling tools instead of maturity
- Not using visual models
- Staying reactive instead of roadmap-driven
- Letting clients choose the wrong tier
- Not leveraging lifecycle management

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Workbook Moment

Open your workbook to identify:

- ❑ Current services by pyramid layer
- ❑ Client placement across tiers
- ❑ Cross-sell opportunities for 2026
- ❑ Your bundle strategy

During breakout you will:

- ❑ Build your 2026 solutions roadmap
- ❑ Identify missing components in your stack
- ❑ Create pyramid-based bundles
- ❑ Outline your cross-sell sequence

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THANK YOU

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