

Case study

A Melbourne MSP now runs every QBR on time

An automated pipeline turns PSA data into a finished quarterly review, with no extra admin for the owner.

Client

8 person MSP, Melbourne

Platform

ConnectWise PSA and Make.com

Result

Every QBR on time

Every QBR

on time for every target customer, with zero extra admin for the owner

Client

8 person MSP, Melbourne

Challenge

No time to run quarterly business reviews with every customer

Solution

An automated pipeline that turns PSA data into a finished QBR report

Tools

ConnectWise PSA, Make.com, Azure AI Foundry

The situation

Every MSP owner knows QBRs keep customers. This owner did too, but at eight people there was no time to prepare them. Each report meant pulling data out of ConnectWise, building charts and writing commentary, customer by customer.

So QBRs slipped. Customers who never saw a review started to see the MSP as a cost, not a partner. Churn went up. Worse, the project work a good QBR uncovers never came up, so revenue walked out the door unnoticed.

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What we built

An automated pipeline that does the preparation from start to finish:



01

Collect

Each quarter, Make.com pulls each customer's data from ConnectWise PSA: tickets, response times, recurring issues and assets.

02

Analyse

AI in Azure AI Foundry reads the data and finds what matters: trends, repeat problems, ageing equipment and risks.

03

Write

The AI writes the report in plain business language, with clear recommendations for the next quarter.

04

Deliver

A finished, customer ready report lands with the owner, ready to review and present.

The result

Every

target customer gets a QBR on time

0

hours of extra admin for the owner

4

steps from raw PSA data to a finished report

QBRs are in place and run on time across every target customer. The owner does no additional admin to make it happen. Each review now arrives with recommendations already written, and recommendations are where project work starts.

Why it worked

The hard part of a QBR is the preparation, not the meeting. Remove the preparation and the meeting happens. The owner now spends QBR time talking to customers, not building slides.

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Remove the preparation and the meeting happens.



Want every customer reviewed every quarter?

Cobotic builds the pipeline that does the work.

Get in touch

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Written and directed by a human. Polish and fluff added by Claude Opus 5.5.

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