

Program Overview

Our Workshops are just the beginning. By leveraging over 20-years of industry experience, we have created the next generation of professional development for MSPs to ensure your organization continues to grow, retain clients, and increase profitability.

Combining 1:1 coaching and routine leadership briefings with peer interaction and ongoing skills development, we'll work with you and your vCIO's, TAM's, & Account Managers to apply lessons learned, execute locally, and optimize the roles for your organization and your clients.



The Program Pillars for Elevating The vCIO

EDUCATE

The vCIO University **Workshop** is a 3-day, highly interactive course designed to help you develop the foundation for excellence as a vCIO and for your Program.

We'll explore the key success factors that apply to all vCIOs, regardless of tenure, which enable you to deliver desired business outcomes by helping your clients plan, grow, optimize and secure their organizations.



- ✓ Instructor-Led Presentations
- ✓ Course Materials
- ✓ Proven Tools & Templates
- ✓ Interactive Lab Work
- ✓ Group Exercises & Presentation
- ✓ Graduation Ceremony
- ✓ Social Events & Peer Interaction

COACH

All Workshop graduates move on to the vCIO-U **Accelerator**. This 60-day post-workshop component is designed to help you & your MSP prioritize and implement key Workshop takeaways faster and more efficiently.

Your personalized 1:1 coaching is designed and tailored to both the vCIO & the organization to ensure alignment from the outset.



- ✓ Account Management (Pre & Post)
- ✓ QBR's & Technology Road Mapping
- ✓ Delivering Business Outcomes
- ✓ Improving Leadership & Soft Skills
- ✓ Personal Development Plans
- ✓ Progress & Prioritization Meetings with MSP Leaders

COLLABORATE

Upon Accelerator completion, graduates then qualify for the **Alumni Program**. This final pillar is designed to enhance a vCIO's knowledge and expertise through ongoing coaching and continued peer group collaboration.

We believe that life-long learning is crucial; our goal is to provide a unique community where vCIOs, MSPs, and their peers can grow together.



- ✓ Ongoing 1:1 Coaching
- ✓ Access to vCIO-U's Online Community, Content Library & Learning Platform
- ✓ Monthly Group Calls, On-going Collaboration & Peer interaction
- ✓ Access to additional course materials as they are published
- ✓ Annual vCIO-U Alumni Conference



The Best vCIO Wins!

More than a tagline. "The Best vCIO Wins" is at the core of vCIO University.

Having helped develop vCIOs since 2010, we know that the vCIO plays a crucial role in the success or failure of any Managed IT Program.

vCIO University delivers a comprehensive curriculum that combines lecture, peer interaction and group exercises with years of industry knowledge and best practices. vCIOs of all experience levels gain clarity of the role, learn tools & tactics, and create actionable takeaways to bring back to the business.

Post graduation, students receive continued support via our 60-Day Coaching Accelerator to ensure execution and value delivery to the client and MSP alike.



vCIO University Workshop Curriculum

Day 1 : Strategic

- vCIO Current State & Direction
- Becoming a World-Class vCIO
- Client Segmentation 2.0 & Metrics
- Achieving Trusted Advisor Status
- Understanding Business Goals, Outcomes & Value
- QBR & Strategic Planning Essentials
- Getting Execs to Care About the QBR

Day 2 : Tactical

- Technical Anatomy of a Business
- Financial Statements & Business Acumen
- Budgeting & Planning Standards
- Gaining Project Acceptance
- Rapid Fire: Asset Management, BCDR & Data Governance, Security & Compliance
- The vCIO & AI
- vCIO in the Sales Process

Day 3 : Developmental

- Business Process Understanding
- Change Management vs. Change Leadership
- Overcoming Stalls & Objections
- Soft Skills & Professional Development
- Putting it All Together
- Presentations, Graduation & Next Steps

Workshop Attendee Feedback - 2026

Ed C. - MSP Owner and Evolve member

"I've been searching for a way to double my business. With what I learned during the workshop, I think I just found it!"

Patrick W. - vCIO, 20 year industry veteran

"Erich came back from the workshop raving about you and completely fired up. Truly your service and training is by far the best, most impactful and USABLE that either of us have ever gone through."

Kanram H, Director of Client Success and longtime member of TruMethods

"Going into the training, I was hoping to pick up a few new ideas to enhance our well-established vCIO program. However, I was absolutely blown away by the depth and quality of the training. Chris and Jim were simply fantastic! They are not only experts in the subject matter but also excel at delivering the content in a way that is engaging and relatable. Over the course of two days, they covered a tremendous amount of material, yet it never felt overwhelming. The topics, while all interconnected, were separated perfectly to ensure clarity and understanding.

One of the highlights of the training was the comprehensive playbook they provide. This playbook is an invaluable resource for any MSP CX team, as it offers a clear roadmap to deliver exceptional value to customers, enhance team confidence, and elevate the vCIO role within the customer base. It truly shifts the mental picture of what the vCIO role means for both the MSP and their customers.

I could not have been more impressed with the vCIO University training. It was time well spent, and I wholeheartedly recommend it to any MSP looking to elevate their vCIO & Account Management program."

Maurice G. - vCIO, 20 year industry veteran

"I usually come into trainings like this very skeptical. That was eliminated in the first 90 minutes. This was absolutely the best..."

Tyler W. - vCIO

"vCIO-U really refined the lens in which we see our partners and since then we've been able to clearly capture their business goals and further develop the relationship simply by focusing on asking good questions. Because we now really understand what they need and where they're headed, they were happy to approve a \$40k project to upgrade the network and wireless. This is a group that's historically been pretty hesitant to spend, but now they can clearly see the value—rather than it feeling like just another shiny new thing the tech team pitched."

Brad S. - Technical Account Manager and 13 year industry veteran

"Thank you for your time and efforts earlier this week. I've been with the company over 13 years and that's the most meaningful training I've been through. I'm looking forward to implementing your ideas and working with you in the future."

Morgan F. - new vCIO, discussing a client meeting and the 4 Boxes slide within an updated QBR deliverable

"It went really well. We just talked about their business for most of the hour. It is going to set me up REALLY well for the next one — I learned a TON about their business, challenges, competitors, cash flow, etc.

I'm actually preparing another QBR deck for a company I've never used this format with. I'm using the 4-box slide to be geared more towards asking questions, rather than telling them what the plan is. The process is amazing!"



Program Pricing

We want to ensure that pricing is not the reason why MSPs can't benefit from participating in the vCIO University Workshops and Community. We've built the Program to be affordable for MSPs and teams of all sizes.

ConnectWise partners are eligible to offset up to 50% of the cost of vCIO-U Workshop and Alumni fees with their earned MDF Funds. If you'd like to take advantage of this benefit, we can help guide you through the approval process.

Workshops, Events, and the Alumni Program

EDUCATE - Workshop

- 3-Days of On-Site Instruction
- Fundamentals & Common Foundation

COACH - Accelerator

- 60-Days of vCIO/MSP Coaching
- Customized Individual Development Plans that align with MSP Priorities
- Execution & Accountability Partner



Pricing (per attendee)

- \$3,495 - Regular Attendee
- \$2,995 - ConnectWise Partner
- \$2,795 - Evolve / SLI Member
- \$1,750 - Active Alumni Member
- Multiple-Attendee Discounts
- Contact for details regarding Private Onsite Events

COLLABORATE - Alumni Program

- 1:1 Coaching Calls
- Monthly Alumni Group Calls
- Special Interest Groups
- Community / Knowledge Sharing
- Access to vCIO-U Content Library
- Invitations to vCIO-U Events



Alumni Program Membership

- \$3,295 1st-Year Members (12-mo.)
- \$3,995 Annual Renewal
- Membership applies to the entire MSP; all are invited to participate in Group activities!
- Discounted Workshop Tuition

