

INDEPENDENT RESEARCH & METHODOLOGY MAP

The Research Behind The Gap Nobody Owns

The Hidden Cause of Stalled MSP Accounts

A reader-facing evidence report mapping independent MSP research, standards, professional frameworks and practitioner evidence to the operating principles used in The Gap Nobody Owns methodology.

Methodology by Bob Roark

Research & Methodology Report — Reader Edition

What This Report Does

It separates three things that should not be confused: (1) independently published evidence about MSP growth, customer value, lifecycle execution, benefits realization, relationship maturity and operating discipline; (2) The Gap Nobody Owns methodology, developed by Bob Roark; and (3) the proprietary diagnostic and execution tools built from that methodology.

Evidence Hierarchy

EVIDENCE TYPE	HOW IT IS USED
Quantitative research & benchmarks	Numeric findings from MSP studies, professional research and proprietary benchmark datasets.
Standards & formal professional frameworks	Established requirements or competency frameworks supporting lifecycle, value, measurement, customer experience, benefits realization and relationship maturity.
MSP / practitioner corroboration	Industry and field sources showing how the same themes appear in QBRs, business development and service-management practice.

Independence & Non-Endorsement Notice

The organizations cited in this report are independent third parties. They have not reviewed, sponsored, certified, approved or endorsed The Gap Nobody Owns: The Hidden Cause of Stalled MSP Accounts, The Gap Nobody Owns methodology, Bob Roark, or any related product or tool. External evidence supports specific problems, principles or practices that align with elements of the methodology; it does not independently validate the proprietary methodology as a complete system.

1. Executive Synthesis

The independent evidence is strongest around six propositions. The exact Five Stages, Seven Laws and diagnostic structures remain proprietary synthesis and applications of The Gap Nobody Owns methodology.

SOURCE	WHAT IT CONTRIBUTES	HOW IT IS USED
HDI	Service-management research and practice emphasizing customer experience, business-value measurement and meaningful metrics.	Quantitative CX-priority evidence in Section 2 plus service-management corroboration.
ChannelPro	MSP-specific guidance that QBRs should center on client business goals, strategic decisions, outcomes and follow-through rather than technical reporting alone.	Corroborates the worked QBR example and The Customer Defines Success.
Shipley Associates	Codified business-development lifecycle plus proprietary benchmarking on process maturity, diagnosis and win-rate performance.	Quantitative/proprietary benchmark evidence is labeled as such; also strengthens Win-stage practice.
RSM Federal	Implementation-oriented federal sales system covering prospecting, positioning, teaming, proposals and operating discipline.	Practitioner corroboration for structured Win-stage execution only; not primary MSP evidence.
HIT Global – Humanising IT	Human-centred ITSM framework focused on people, experience, trust, satisfaction, journey mapping, friction and meaningful service outcomes.	Corroborates Laws 2 and 5, the Customer gap, QBR diagnosis, and the premise that operationally ‘green’ service can still miss the lived customer/user experience.

2. Quantitative & Standards-Based Evidence

This section integrates the strongest numeric findings, standards and formal frameworks used in the report. Numeric claims are attributed to the organization that published them; proprietary benchmark data are labeled as such.

Each evidence card is a separate source finding. The gray bands identify the field; the evidence itself is kept visually dominant.

EVIDENCE 1	40%	Kaseya – 2026 State of the MSP
Study basis: Survey of 1,000+ MSPs worldwide		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
40% of respondents cited acquiring new customers as their top challenge; Kaseya also describes buyers as more selective and demanding clearer proof of value.	When new-logo acquisition is difficult, retaining, growing and proving value to existing accounts becomes more important.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Expand, Renew; Sales Wins Them. Delivery Grows Them.; The Customer Defines Success.	Market-pressure evidence; it does not prove the methodology causes retention or expansion.	

EVIDENCE 2	48%	Kaseya – 2026 State of the MSP
Study basis: Survey of 1,000+ MSPs worldwide		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
48% ranked AI as the number-one client need in Kaseya's release; AI is framed as both client demand and an operational scaling lever.	Supports the need for disciplined AI use inside an operating context rather than generic prompting.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Standalone MSP Executive AI Playbook; Capability, Process and Measurement gaps.	It does not validate specific prompts or prove product-specific outcomes.	

EVIDENCE 3	1,100+	ScalePad – 2026 MSP Trends Report
Study basis: Anonymous survey of 1,100+ North American MSPs		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
ScalePad reports 55% projected double-digit growth and 87% were optimistic about channel growth.	Places the methodology inside a growth market where customer success and execution still differentiate operators.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
All Five Stages; market context.	Growth expectations are self-reported projections.	

EVIDENCE 4	60%	ScalePad – 2026 MSP Trends Report
Study basis: 1,100+ North American MSP respondents		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
60% operate a formal Customer Success program; ScalePad reports stronger operators tend to run more robust initiatives.	Supports lifecycle execution beyond reactive service delivery.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Transition, Stabilize, Expand, Renew; Laws 2, 4 and 5.	Directional association, not proof of causality.	

EVIDENCE 5	#2	ScalePad – 2026 MSP Trends Report
Study basis: 1,100+ North American MSP respondents		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
Growing existing client accounts rose to the #2 growth driver.	Supports treating account expansion as an operating outcome, not a late sales event.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Expand; Law 1.	Does not validate the exact Expand-stage process.	

EVIDENCE 6	42% vs 29%	ScalePad – 2026 MSP Trends analysis
Study basis: 1,100+ MSP professionals		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
ScalePad reports 42% of top performers offer vCIO services versus 29% overall; top performers also use more regular reviews, roadmaps, budgets, forecasting, account management and structured onboarding.	Supports strategic reviews that connect operational evidence to customer goals and next actions.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Stabilize, Expand, Renew; Customer, Clarity and Measurement gaps.	Practice differences are associated with performance; individual causal effects are not isolated.	

EVIDENCE 7	83% / 74%	PMI – Strategic Impact of Projects (2016)
Study basis: PMI Pulse of the Profession research		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
PMI reports 83% of organizations lacked maturity in benefits realization; when benefits are identified before	Directly reinforces defining expected value before execution and carrying it into delivery.	

project start, 74% of projects meet goals and business intent.	
WHERE IT MAPS	EVIDENCE BOUNDARY
Law 2; Law 6; Win, Transition, Stabilize; Clarity, Customer, Measurement.	<i>Project/program evidence, not an MSP-specific test of the methodology.</i>

EVIDENCE 8	\$112M less / 50% more	PMI – Beyond the Project (2016)
<i>Study basis: PMI benefits-realization research</i>		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
PMI reports organizations investing in benefits realization waste US\$112M less per US\$1B invested and, on average, 50% more projects meet original goals and business intent.	Supports sustained value, leadership, cross-functional ownership, monitoring and measurement after transition.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Transition, Stabilize, Renew; Ownership and Measurement gaps; prove movement.	<i>Benefits-realization evidence; no claim that the proprietary system produces these figures.</i>	

EVIDENCE 9	59%	HDI – State of Service Management in 2024
<i>Study basis: HDI service-management industry research</i>		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
HDI reported 59% focused on improving customer experience as the top priority for ITSM projects.	Supports moving service management beyond internal operational activity toward customer experience and business value.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Law 2; Law 5; Customer and Measurement gaps.	<i>Industry research; not validation of the proprietary taxonomy.</i>	

EVIDENCE 10	400+ / 20+ yrs	Shipley Associates – Win Rate Diagnostic & Performance Benchmarking
<i>Study basis: Shipley Associates proprietary benchmark dataset across sectors/geographies</i>		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
Shipley Associates reports 400+ assessments and 20+ years of maturity data; organizations moving from ad hoc to defined processes saw win rates move from below 35% to 51-80%, with 2x effectiveness on large strategic programs.	Provides Win-stage corroboration for diagnosis, process maturity and disciplined pursuit execution.	

WHERE IT MAPS	EVIDENCE BOUNDARY
Win; Process, Clarity, Capability and Measurement gaps.	Proprietary Shipley Associates benchmark data, not independent academic research and not MSP-specific.

EVIDENCE 11	2.5x–3x	Service Leadership Index benchmark
Study basis: Ongoing solution-provider financial/operational benchmark		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
Service Leadership says top-quartile solution providers earn roughly 2.5x–3x the bottom-line profit percentage of median peers and tracks extensive maturity metrics.	Supports objective diagnosis, maturity and disciplined management as financially meaningful.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Assessment → prioritize → execute → measure → reassess; Management, Process, Measurement.	No causal claim is made for The Gap Nobody Owns methodology.	

EVIDENCE 12	Lifecycle + value	ISO/IEC 20000-1:2018
Study basis: International service-management standard		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
ISO requires planning, design, transition, delivery and improvement of services to meet requirements and deliver value, with monitoring, measurement and review.	Supports lifecycle discipline, transition, measurement and continual improvement.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Transition, Stabilize, Renew; Process, Measurement, Management.	ISO does not validate the proprietary Five Stages or Seven Laws.	

EVIDENCE 13	5 competencies	CXPA CX Framework
Study basis: Framework verified through industry-wide job-task analysis; 300+ global CX professionals provided feedback in the 2020 analysis		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
CXPA organizes professional CX practice around Customer Insights, CX Strategy, Metrics/Measurement/ROI, Design/Implementation/Innovation, and Culture/Accountability.	Supports customer-defined success, experience-gap analysis, prioritization, measurement, cross-functional accountability and continuous improvement.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Law 2; Law 5; Customer, Measurement, Ownership, Behavior gaps.	Formal professional framework, not an MSP-specific causal study.	

EVIDENCE 14	5 maturity levels	BRM Institute – Relationship Maturity Model
<i>Study basis: Professional discipline/framework</i>		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
BRM Institute defines Ad Hoc, Order Taker, Service Partner, Trusted Advisor and Strategic Partner maturity levels and emphasizes reporting value relevant to organizational progress and results.	Supports moving beyond routine service reporting toward shared goals, realized value and strategic partnership.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Stabilize, Expand, Renew; Laws 2, 3 and 5.	Professional framework; it does not validate the proprietary lifecycle or terminology.	

EVIDENCE 15	Needs → goals → process → metrics	ISACA / COBIT
<i>Study basis: COBIT goals-cascade and process-metrics guidance</i>		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
ISACA describes stakeholder needs cascading into enterprise and IT goals, with processes and metrics tracking achievement.	Supports starting with customer-defined outcomes and testing whether ownership, process and measurement create movement.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Law 2; Customer, Clarity, Ownership, Process, Measurement, Incentive/Priority.	COBIT and The Gap Nobody Owns taxonomies are different.	

EVIDENCE 16	Retention is lagging	Gartner – Optimal Metrics to Prove the Value of Customer Success Management
<i>Study basis: Gartner research abstract</i>		
WHAT THE EVIDENCE SAYS	THE GAP NOBODY OWNS CONNECTION	
Gartner's public abstract says customer-success teams primarily use retention, a lagging metric, and recommends progression measures through onboarding, adoption, value realization and expansion.	Supports evidence of progress before renewal itself becomes the warning signal.	
WHERE IT MAPS	EVIDENCE BOUNDARY	
Transition, Stabilize, Expand, Renew; Law 4; Measurement.	Public abstract does not provide sample size or validate the proprietary method.	

3. Five Stages: Evidence Depth Map

The Five Stages are proprietary to The Gap Nobody Owns methodology. Independent sources do not test Win → Transition → Stabilize → Expand → Renew as a complete system; they do support multiple lifecycle, benefits-realization, customer-experience and relationship-maturity principles embedded in it.

STAGE	INDEPENDENT EVIDENCE	WHAT THE METHODOLOGY ADDS	STRENGTH
Win	Kaseya proof-of-value pressure; ISACA stakeholder needs; PMI benefits identified before execution; Shipley Associates diagnosis/process maturity.	A pre-delivery discipline for aligning promise, customer outcome, assumptions, ownership and executable reality.	Stronger Support
Transition	ISO service transition; TSIA onboarding; PMI transition into sustained benefits; CXPA implementation/accountability.	A named stage preserving context, expectations, ownership and relationship continuity from Sales to Delivery.	Strong
Stabilize	TSIA adoption logic; ISO delivery/improvement; ScalePad structured onboarding; CXPA experience-gap analysis; BRM service-partner maturity.	A deliberate confidence-building stage before expansion is pursued.	Strong
Expand	TSIA Expand; ScalePad existing-account growth #2; BRM Trusted Advisor/Strategic Partner; CXPA ROI/value.	Treat expansion as earned through demonstrated value, confidence and strategic relevance.	Strong
Renew	TSIA Renew; Gartner lifecycle metrics; PMI sustain benefits; BRM realized value/shared goals.	Treat renewal as the accumulated result of earlier execution, not a late commercial event.	Strong

4. Seven Laws: Evidence Strength Map

The Seven Laws are proprietary operating principles of The Gap Nobody Owns methodology, developed by Bob Roark. Independent evidence supports many underlying ideas; no cited organization tests or endorses the Seven Laws as a proprietary set.

LAW	BEST EXTERNAL SUPPORT	RATING	WHY
1. Sales Wins Them. Delivery Grows Them.	ScalePad existing-account growth; Kaseya acquisition pressure; BRM strategic-partner/value maturity.	Strong	Growth increasingly depends on existing relationships and realized value; the law assigns Delivery an explicit growth role.
2. The Customer Defines Success.	ISACA stakeholder-needs cascade; CXPA Customer Insights/CX Strategy; PMI expected benefits.	Strong	Multiple frameworks begin with stakeholder/customer outcomes rather than internal activity.
3. Customers Don't Buy Technology. They Buy Confidence.	Kaseya proof-of-value pressure; BRM Trusted Advisor/Strategic Partner; ScalePad strategic CS practices.	Supporting+	External sources support trust, value proof and strategic relationship maturity; 'confidence' is the methodology's synthesis.
4. Renewals Begin on Day One.	TSIA onboarding → adoption → expansion → renewal; Gartner lifecycle metrics; PMI benefits identification and sustainment.	Strong	Early definition and execution are independently connected to later realized value and renewal-like outcomes.
5. You Can Meet Every SLA and Still Lose the Customer.	CXPA customer insights/outcomes/ROI; Gartner lifecycle/value measurement; BRM value reporting; HDI CX priority.	Stronger Support	Formal CX and relationship frameworks make clear that internal service measures are incomplete without customer-perceived value and outcomes.
6. Delivery Starts Before the Sale.	PMI benefits identified before project start; ISACA goal alignment; Shipley Associates pursuit discipline; ISO lifecycle.	Stronger Support	Independent sources support defining outcomes and disciplined alignment before execution begins.
7. The Easiest Company to Do Business With Usually Wins.	CXPA customer insights, journey/touchpoint and improvement practices; service-experience practice.	Supporting	Ease/friction are established CX concepts; 'usually wins' remains an operating law, not a universal causal claim.

5. From Research to Diagnosis to Action

Independent research usually tells an MSP what matters. The Gap Nobody Owns methodology converts those principles into a repeatable diagnostic and execution path.

LAYER	QUESTION ANSWERED	THE GAP NOBODY OWNS ASSET	EVIDENCE IT OPERATIONALIZES
Understand	Why can a technically healthy account still stall?	The Gap Nobody Owns book	ScalePad, Gartner, Kaseya, CXPA, BRM Institute and Humanising IT: value, experience, lifecycle and relationship maturity.
Locate	Where in the relationship should we look?	Operating Assessment: 35 Stage × Law intersections	TSIA/ISO lifecycle; PMI benefits lifecycle; CXPA and Humanising IT customer/experience logic; ISACA goals/metrics.
Diagnose	Why is execution stalled?	10 gap types: Clarity, Expectation, Ownership, Capability, Behavior, Management, Process, Measurement, Customer, Incentive/Priority	ISACA; ISO; CXPA; PMI; Humanising IT experience/friction discovery; maturity benchmarks.
Accelerate	How do we analyze and draft the work faster?	Standalone MSP Executive AI Playbook – separate AI product for applying the methodology to analysis and decision-making.	Kaseya AI demand plus disciplined operating context.
Execute	What changes in the next 90 days?	MSP Execution Gap System – Assessment + 10-stage Workbook + Toolkit + 16 System-specific AI prompts.	PMI benefits realization; ISO continual improvement; Service Leadership and Shipley Associates maturity/benchmark principles; evidence-based reassessment.

Product distinction: *The standalone MSP Executive AI Playbook and the 16 AI prompts included inside the MSP Execution Gap System are different assets. The System's 16 prompts are stage-specific prompts embedded in its 10-stage execution workflow; they are not the standalone MSP Executive AI Playbook.*

6. Worked Example: Better QBRs

A recommendation such as 'run better QBRs' is not yet an operating method. This example shows how the methodology moves from industry finding to diagnosis and action.

STEP	INDUSTRY / FRAMEWORK EVIDENCE	METHODOLOGY ACTION	OUTPUT
1. Define value	Kaseya proof of value; ISACA stakeholder needs; PMI expected benefits; CXPA customer insight; Humanising IT human-centred needs.	Write the customer's expected business outcome in observable terms.	Outcome statement.
2. Establish evidence	Gartner lifecycle measures; CXPA metrics/ROI; BRM value-relevant KPIs; Humanising IT experience evidence.	Identify evidence showing movement or lack of movement.	Leading evidence set.
3. Locate the stall	TSIA/ISO lifecycle; PMI benefits lifecycle.	Identify whether the issue is in Win, Transition, Stabilize, Expand or Renew.	Stage location.
4. Diagnose cause	ISACA/ISO; CXPA experience-gap analysis; PMI ownership; Humanising IT discovery, journey and friction mapping.	Test the ten execution gap types instead of assuming the QBR itself is the problem.	Primary gap hypothesis.
5. Assign ownership	PMI accountability; CXPA accountability; BRM shared goals.	Name one owner, due dates, dependencies and escalation path.	Owned action plan.
6. Execute 90 days	ISO continual improvement; Service Leadership maturity; Shipley Associates diagnose-before-prescribe.	Run the highest-value change through a defined execution cycle.	90-day execution plan.
7. Prove movement	Gartner, ISACA, PMI, CXPA and BRM emphasize objective progress/value measures.	Compare new evidence against the original outcome and baseline.	Proof / reassessment.

7. How Independent Evidence Aligns with the Methodology

The Five Stages and Seven Laws are proprietary components of The Gap Nobody Owns methodology, developed by Bob Roark. The table below shows where independent evidence ends and the methodology's synthesis or application begins.

THE GAP NOBODY OWNS ELEMENT	WHAT INDEPENDENT EVIDENCE SUPPORTS	HOW THE GAP NOBODY OWNS APPLIES IT
Five Stages & Seven Laws	TSIA, ISO, Gartner, ISACA, PMI, CXPA, BRM Institute, Humanising IT and MSP research support lifecycle management, benefits realization, customer-defined value, experience, measurement, relationship maturity, expansion and renewal principles.	The methodology synthesizes these and related operating principles into Five Stages and Seven Laws for managing MSP customer relationships.
Operating Assessment	Governance, service-management, CX, human-centred design, benefits-realization and maturity frameworks support structured assessment, ownership, process, measurement and objective review.	The methodology organizes Five Stages × Seven Laws into 35 intersections to identify where execution may be breaking down.
10 Execution Gap Types	Independent frameworks repeatedly identify issues involving goals, ownership, capability, process, measurement, management, behavior, customer outcomes and experience friction.	The methodology organizes recurring execution problems into 10 diagnostic gap types to help identify why an account is stalled.
Standalone MSP Executive AI Playbook	Kaseya MSP research supports AI's growing importance; Humanising AI from HIT Global reinforces applying AI around human needs, trust, adoption and value rather than automation alone.	A separate AI product applying The Gap Nobody Owns methodology to analysis and decision-making. It is distinct from the 16 prompts built into the Execution Gap System.
MSP Execution Gap System	PMI, ISO, Service Leadership, Shipley Associates and related evidence support structured execution, benefits/value measurement, maturity, defined processes and continual improvement.	Turns the methodology into a structured execution cycle using the Assessment, 10-stage Workbook, Toolkit and 16 System-specific AI prompts.

Methodology ownership: *The Five Stages, Seven Laws, Operating Assessment, 10 Execution Gap Types, MSP Executive AI Playbook and MSP Execution Gap System are proprietary components and applications of The Gap Nobody Owns methodology, developed by Bob Roark. The cited organizations have not endorsed, certified or independently validated these proprietary elements.*

8. MSP & Practitioner Corroboration

These sources show the same operating themes in MSP, service-management and business-development practice. They are not presented as equivalent to an international standard, formal professional framework or independent quantitative study.

SOURCE	WHAT IT CONTRIBUTES	HOW IT IS USED
HDI	Service-management research and practice emphasizing customer experience, business-value measurement and meaningful metrics.	Quantitative CX-priority evidence in Section 2 plus service-management corroboration.
ChannelPro	MSP-specific guidance that QBRs should center on client business goals, strategic decisions, outcomes and follow-through rather than technical reporting alone.	Corroborates the worked QBR example and The Customer Defines Success.
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HIT Global – Humanising IT	Human-centred ITSM framework focused on people, experience, trust, satisfaction, journey mapping, friction and meaningful service outcomes.	Corroborates Laws 2 and 5, the Customer gap, QBR diagnosis, and the premise that operationally ‘green’ service can still miss the lived customer/user experience.

9. Source Register

Primary public sources used in this edition. Full URLs are printed for auditability. Where a source is a proprietary benchmark or practitioner resource, that status is stated in the report.

Kaseya – 2026 State of the MSP

<https://www.kaseya.com/press-release/ai-emerges-as-the-key-to-scaling-msp-operations-as-growth-gets-harder/>

ScalePad – 2026 MSP Trends Report

<https://www.scalepad.com/2026-msp-trends-report>

TSIA – Using Onboarding to Drive Adoption, Expansion and Secure Renewals

<https://www.tsia.com/blog/using-onboarding-to-drive-adoption-expansion-and-secure-renewals>

Service Leadership – Service Leadership Index Reports

<https://www.service-leadership.com/vendors/service-leadership-index-reports/>

ISO – ISO/IEC 20000-1:2018

<https://www.iso.org/standard/70636.html>

ISACA – Applying the Goals Cascade

<https://www.isaca.org/resources/news-and-trends/industry-news/2017/applying-the-goals-cascade-to-the-cobit-5-principle-meeting-stakeholder-nee>

Gartner – Optimal Metrics to Prove the Value of Customer Success Management

<https://www.gartner.com/en/documents/6328247>

PMI – Strategic Impact of Projects: Identify Benefits

<https://www.pmi.org/learning/thought-leadership/pulse/identify-benefits-business-results>

PMI – Beyond the Project: Sustain Benefits to Optimize Value

<https://www.pmi.org/learning/thought-leadership/pulse/sustain-project-benefits-optimize-value>

PMI – Benefits Realization Management: A Practice Guide

<https://www.pmi.org/standards/benefits-realization>

CXPA – CX Framework

<https://www.cxpa.org/earn-your-cxcp/cxframework>

BRM Institute – BRM Metrics / Relationship Maturity Model

<https://brm.institute/brm-metrics/>

BRM Institute – About Business Relationship Management

<https://brm.institute/about-business-relationship-management/>

HDI – Press Room / State of Service Management in 2024 finding

<https://www.thinkhdi.com/about/press-room>

Shipley Associates – Win Rate Diagnostic & Performance Benchmarking

<https://www.shipleywins.com/win-rate-diagnostic-performance-benchmarking>

Shipley Associates – Business Development Lifecycle Guide

<https://www.shipleywins.com/tools-and-guidebooks/shipley-business-development-lifecycle-guide>

ChannelPro – QBR guidance for MSPs

<https://www.channelpronetwork.com/2025/10/23/how-to-structure-qbrs-for-msps-to-deliver-value-to-clients/>

RSM Federal – The Government Sales Manual

<https://rsmfederal.com/resource/the-government-sales-manual/>

HIT Global – Humanising IT

<https://www.hitglobal.services/humanising-it/>

HIT Global – Humanising AI

<https://www.hitglobal.services/humanising-ai/>