

STRATEGIC BUSINESS REVIEW

Sep 2025 – Sep 2026

Lakebridge Pediatric Partners

Pediatric care · 229 people · three clinics

500h

Working hours returned to your team

95%

Positive survey responses from your people

+55%

Ticket volume vs the year before

What is in this review

Seventeen chapters, in the order we will walk them. Every figure traces to a record your account team can open in the room.

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Everything that mattered, in five sentences.
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Who to call, and the decisions before we leave the room.

WHERE THE NUMBERS COME FROM

Seven live feeds from the systems that run and protect your environment, blended into plain language. No screenshots of dashboards, the records themselves.

SERVICE DESK

SATISFACTION

LIFECYCLE

SECURITY

CONTINUITY

NETWORK

PRIVILEGED ACCESS

HOW TO READ THE NUMBERS

Tickets are always split two ways: what your people raised, and what monitoring caught before anyone felt it.

No data means no number. A block with nothing behind it drops off the page rather than printing a zero.

Peer figures are anonymized medians from our own book, reported only where the group is large enough to keep any firm out of view.

Dollar figures print only where the arithmetic is on the page beside them.

2,966

Support tickets this year



Lakebridge's technology work stayed busy this year: 25 projects touched the ground, from a new Northgate network build to clinic moves and equipment swaps, and 229 tasks across that work finished, with none left sitting past their date. Your service desk kept pace too: staff raised 1,298 tickets and monitoring caught 1,668 more before they became problems, with a median first response of 3 minutes and 95% of surveyed staff coming away positive.

229 tasks finished this year, and not one was left sitting past its date.

LAKEBRIDGE PEDIATRIC PARTNERS · THIS YEAR

Two things deserve a decision before the next review. First, 206 machines now sit past their warranty window, a gap already scoped and waiting on a coverage call in the hardware chapter. Second, six systems that have proven they can recover from backup are currently paused, and two more have gone without any check for close to two years: that gap is structural, and the backup chapter carries the full picture.

Satisfaction rose window on window

Positive sentiment moved from 88.2% to 95% this window, across 139 scored responses.



Survey feed · every response your people scored in the window

3min

Median first response

+55%

Tickets vs the year before

809 / 850

Device maturity index

What the quiet work was worth

Hours your team did not spend on technology this year, with the arithmetic printed beside every line.

WHAT WE DID QUIETLY	HOURS RETURNED
Problems caught before your people felt them 1,668 monitoring catches × 12 min of interruption avoided	334 h
Tickets closed without a second call 1,095 of 1,298 resolved on first contact × 8 min saved	146 h
Starters and leavers handled end to end 41 onboards and offboards × 29 min of admin returned	20 h
Patching and updates run outside clinic hours 371 machines × 11 update cycles, none during patient hours	counted above
Projects delivered without after-hours downtime 25 projects, 229 tasks, none past their date	counted above

Working hours returned to your team

500 h

DOWNTIME AVOIDED, CONSERVATIVELY

\$246,000

1,668 catches → 41 incidents × 90 min × \$4,000/h

We count only the catches our records tie to a system your clinics depend on, and only where a person had to intervene. Alerts that cleared themselves are not counted.

Hourly rate confirmed with your finance team in March 2026. Incident count from your own monitoring record.

DELIVERED THIS YEAR

25

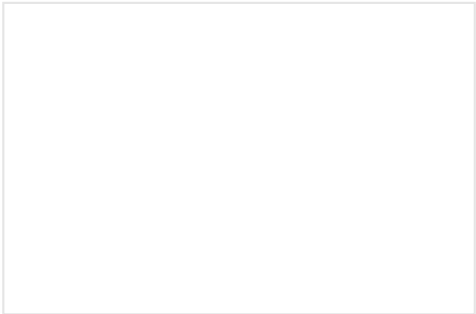
projects delivered this year

Northgate network build · Cedar Hollow clinic move · imaging server refresh · phone system replacement · and 21 more

WHAT WE DON'T COUNT

Time your own staff spent on technology, anything we could not tie to a record, and every hour of our own work. This page counts your hours, not ours.

The quiet work is the work nobody had to think about. It is also the hardest to see, which is why the arithmetic prints beside it.



The partnership scorecard



Fast desk, heavy year

Measured against 53 firms of 150 to 250 people across our book, medians frozen the day this review was built. A conversation aid, not a scoreboard.

229 SEATS • SUPPORT CONTRACT MEDIAN FROZEN SEPTEMBER 16, 2026

MEASURE	YOU ● VS PEER MEDIAN	YOU	MEDIAN	STANDING
Median first response lower is better · of 48 reporting		3 min	11 min	▲ AHEAD
First-contact resolution higher is better · of 44 reporting		84%	71%	▲ AHEAD
Tickets per person each year lower is better · of 51 reporting		13.0	9.4	▼ BEHIND
Satisfaction, positive higher is better · of 46 reporting		95%	92%	● IN LINE

Your desk is fast; your volume is the outlier

A median first response of 3 minutes sits eight minutes inside the median for firms your size, and first-contact resolution runs 13 points ahead: when someone is stuck, they are back at work quickly. The measure to watch is volume. 13 tickets per person a year against a median of 9.4, and 55% more than your own last window. Some of that is the Northgate build and the Cedar Hollow move; the rest tracks the aging fleet the hardware chapter prices.

AGAINST PUBLISHED FIGURES your measure beside our book's median and a dated, sourced industry figure

MEASURE	YOU	PEERS	INDUSTRY	STANDING
Median first response IN PLACE • DEDICATED POD COVERAGE	3 min	11 min	under 30 min MSP BENCHMARK REPORT 2026	▲ AHEAD
Tickets per person each year	13.0	9.4	10.2 MSP BENCHMARK REPORT 2026	▼ BEHIND

Peer figures are anonymized medians from our book, reported only for groups large enough to keep a firm out of view.

How you compare • fleet & AI

Only 2 pediatric groups of that size are in our book, too few to compare, so this uses published figures for pediatric practices with 150 to 250 employees and 53 firms of that size across our book.

229 SEATS • SUPPORT CONTRACT MEDIAN FROZEN SEPTEMBER 16, 2026

MEASURE	YOU ● VS PEER MEDIAN	YOU	MEDIAN	STANDING
Average fleet age lower is better • of 33 reporting		3.2 yrs	3.7 yrs	● IN LINE
Out of warranty lower is better • of 33 reporting		55%	46%	▼ BEHIND
Average server age lower is better • of 20 reporting		2.4 yrs	2.5 yrs	● IN LINE

Where the fleet is behind

Warranty coverage is the measure to watch: 206 of your machines run past their coverage window, the standing this quarter starts from. That gap is already on the road-ahead page for FY2026, with 9 more warranties expiring within 90 days.

AI ADOPTION • COPILOT

Copilot adoption

Copilot seats sit at 0 against 229 people this window. Adoption has not started yet, which means the decision is still open and the first seat is yours to schedule.

INDUSTRY CONTEXT general framing • not measured from your record

For pediatric practices, ticket volume tends to track patient scheduling cycles and clinic hours rather than headcount alone: a busy stretch of onboarding, migrations or office moves can push ticket counts up without signaling a problem. What matters is whether response time and resolution hold steady through those stretches, which is the pattern worth watching here.

Peer figures are anonymized medians from our book, reported only for groups large enough to keep a firm out of view.

1,450

attempts stopped before a person saw them

Three layers did the work this year: filtering ahead of the inbox, protection on every machine, and your own people reporting what looked wrong. 1,450 attempts died in the first two layers, six needed an engineer, and none reached your data. The one to watch is patching: the machines that fall behind on updates are the same machines the hardware chapter wants replaced.

1,412



Quarantined before the inbox

Filtering caught them ahead of your people.

38



Isolated on the endpoint

Protection on the machine stopped what reached it.

6



Escalated to an engineer

A person reviewed each one and closed it out.

0



Reached your data

No incident this window touched patient or business data.

27

Threats your people reported

★ Staff forwarded 27 suspicious messages this year. Nine were real, and already blocked.

91%

Multi-factor coverage

208 of 229 accounts sign in with a second factor. The remaining 21 are on the identity plan.

WORTH WATCHING

Patching lags on the aging machines

34 machines went more than 30 days without a security update, and they are the same machines already past warranty.

\$4.88M

is the average cost of a data breach worldwide, which is the number the four layers above are working against. IBM Cost of a Data Breach 2024

Who can change what on your computers

Controlled means admin rights are decided by an approval or a preset rule, rather than left switched on. Computers are the state as of this review; the requests are the year's.

74%

of assessed computers under admin-rights control

232 of 314 assessed

39 of the controlled computers run on preset rules alone, with no approver in the loop. That is deliberate for imaging tools and print drivers, and worth a look each review.

371 computers managed

82 not controlled right now

11 past the time we allow in that mode

57 reporting a mode we cannot read yet

REQUESTS FOR ADMIN RIGHTS THIS YEAR

486

requests in all

402

approved

61

denied

18

still waiting

5

withdrawn

MOST REQUESTED · WHAT WAS ASKED FOR, NEVER WHO ASKED

1	Practice imaging viewer update	96
2	Printer driver install	74
3	Dictation software update	58
4	Windows feature update	41
5	Vendor remote support tool	29

The machines your people rely on

371

managed devices

1,446

network devices watched

915

critical open alerts

3

servers on an unsupported system

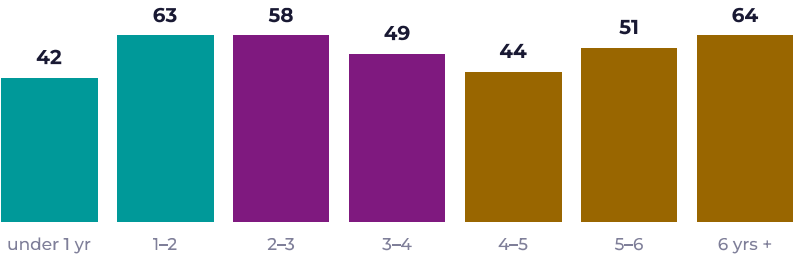
DEVICE MATURITY scored like credit, 300–850 · refreshed nightly

809 ▲ UP 14



The index moved up 14 points this year as new machines landed at Northgate. It is held back by the 206 machines now past warranty.

FLEET AGE, DEVICE BY DEVICE



WHAT THE DATA CONNECTS

The 64 machines over six years old are 17% of the fleet and account for 31% of your hardware tickets.

Replacing that group would remove about one interruption a week across your clinics.

THE APPLE FLEET

18 Macs

All 18 run a supported version and check in on schedule.

SITES · ONE PICTURE

Northgate	168
Millbrook	121
Cedar Hollow	74
Remote and home	8

Hardware lifecycle detail

The machines behind the fleet count, past warranty or aging out first, in the order the coverage decision has to follow.

371

Fleet size

206

Past warranty · 55% of 371

9

Expiring in 90 days · 2% of 371

Warranties ending within 90 days

9 warranties lapse within 90 days, a near-term coverage decision on devices your clinics use every day.

Lifecycle feed · warranty end dates as of September 16, 2026

ENDING IN 90 DAYS

9

DEVICE	SPEC	AGE	STATUS	ROADMAP
LPP-NG-P31	HP EliteBook 1040 G3 Notebook PC	8.4 yr	▲ WARRANTY EXPIRED	Workstation Replacement
LPP-MB-P10	HP EliteBook 840 G6 Notebook PC · Windows 11	7.3 yr	▲ WARRANTY EXPIRED	Workstation Replacement
10.24.6.40	HPE DL380 Gen10 6130 2P 64G 8SFF Svr	7.1 yr	▲ WARRANTY EXPIRED	Server Replacement
NPIC7F2B1	HP Color LaserJet Pro M452dw	7.1 yr	▲ WARRANTY EXPIRED	Workstation Replacement
LPPMBDC01	HPE ML110 Gen10 4210 1P 16G 8SFF Svr	7.1 yr	▲ WARRANTY EXPIRED	
LPP-NG-M01	HP EliteBook 850 G6 Notebook PC · Windows 11	7.0 yr	▲ WARRANTY EXPIRED	Workstation Replacement
LPP-NG-P37	HP EliteBook 840 G6 Notebook PC · Windows 11	6.8 yr	▲ WARRANTY EXPIRED	Workstation Replacement
LPP-MB-PSL-1	HP EliteBook 840 G7 Notebook PC · Windows 11	6.2 yr	▲ WARRANTY EXPIRED	Workstation Replacement
LPP-NG-PSL-1	HP EliteBook 840 G7 Notebook PC · Windows 11	6.2 yr	▲ WARRANTY EXPIRED	Workstation Replacement
LPP-L11	HP EliteBook 840 G7 Notebook PC · Windows 11	6.1 yr	▲ WARRANTY EXPIRED	Workstation Replacement

...and 361 more devices. Your account team keeps the full list.

The call in front of you: renew, replace, or self-insure the 206 out-of-warranty machines, starting with the 9 expiring within 90 days.

12/18

protected systems proven to boot from their own backup

Eighteen systems are protected. Twelve have been started from their own backup and reviewed by a person, which is the only test that counts. Six are paused right now, and two of those have gone close to two years without a check.

▲ NEEDS ATTENTION

Six systems, including both domain controllers and the imaging server, carry boot-verified proof they would recover but are not capturing new backups today. If one failed this morning, the restore point would be months old. Resuming them is the first item on the watching page.

VERIFICATION RESULTS each protected system, booted from its own backup and reviewed by a person

LPPNGDC01	BOOTED AND REVIEWED	Sep 9, 2026
LPPMBDC01	BOOTED AND REVIEWED	Sep 9, 2026
EHR01	BOOTED AND REVIEWED	Sep 8, 2026
FILE01	BOOTED AND REVIEWED	Sep 8, 2026
IMG01	BOOTED AND REVIEWED	Mar 14, 2026
RELAY01	BOOTED AND REVIEWED	Feb 2, 2025

41 min

Recovery drill • June 18, 2026

Time to bring the imaging server up in the recovery environment. Measured, not promised.

229 seats

Mail, files and calendars copied daily to storage outside your tenant.

3,214 checks

Automated verification checks across the year, each one logged.

IN PLAIN TERMS

If Northgate lost its server room on a Tuesday morning, the systems your clinics depend on come up in the recovery environment from the previous night's copy, in about the 41 minutes the June drill measured. The six paused systems are the exception. Their copies are months old, which is why they sit at the top of the watching page.

What we're watching • priced

The three calls worth making before the next review, in the order they would cost you most if left alone.

▲ ACT FIRST

Verified backups sitting paused

Six systems, including both domain controllers and the imaging server, carry boot-verified proof they would recover, but they are not capturing new backups right now. If one fails today, you would restore to a point months old. We will work to get these resumed before the next review.

relay - BK-2 IMG01 - BK-3 LPPMBDC01 - BK-5

By quote

scoped for your review

ESTIMATE

🕒 PLAN NOW

Warranties lapsing within 90 days

9 warranties expire within 90 days, on top of the 206 already past coverage. A failure on one of these after expiry means repair or replacement comes out of pocket, with no vendor backstop, right as your fleet keeps aging. The coverage call needs to land before that window closes.

managed Windows fleet - FL-1

By quote

scoped for your review

ESTIMATE

★ BUDGETED

Open critical network alerts

Your network reports 915 critical open alerts across 1,446 devices, roughly one for every two devices, with no documented fix path yet. Left unsorted, it is hard to tell which alerts are noise and which are the next outage. We will help you set a priority order for remediation.

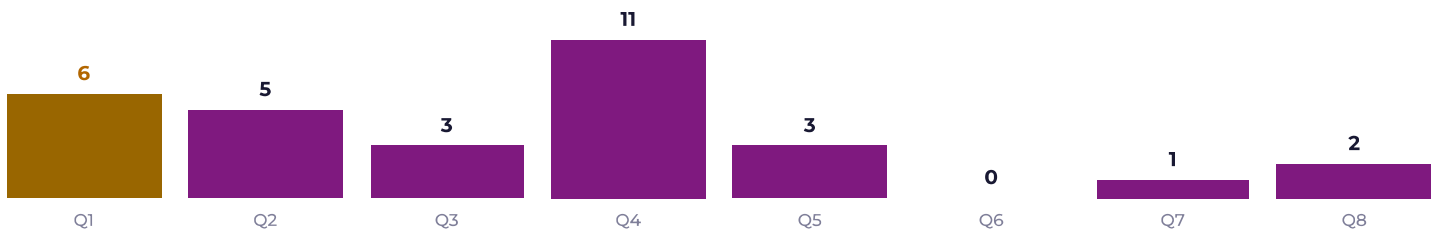
managed network - NW-1

Included

covered under your agreement

ESTIMATE

WARRANTY RUNWAY • NEXT 8 QUARTERS



This quarter's crest is the coverage cliff: 206 machines already past warranty and 9 more expiring within 90 days. The next crest should be smaller by the next review.

9 gaps in your coverage today

What you have with us, and what you do not. An insurance-style read of the protections around your practice.



THE COVERAGE MAP ■ in place □ not covered

FOUNDATION

■ Managed endpoints	■ Managed network	■ Patch management
■ Service desk	■ Lifecycle planning	

SECURITY

■ Email filtering	■ Endpoint protection	■ Multi-factor identity
□ Security awareness training	□ Managed detection and response	■ Privileged access control
□ Vulnerability scanning	□ Dark web monitoring	

CONTINUITY

■ Server backup	■ Cloud workspace backup	□ Continuity site
■ Recovery drills		

MODERN WORK

■ Device provisioning	■ Phone system	□ Copilot enablement
□ Automation of manual work	□ Dashboards	□ Custom applications

WORTH A CONVERSATION

▲ NOT COVERED

01

Managed detection and response

Your endpoints are protected, but nobody watches the alerts overnight. Something that lands at 2am waits for morning.

▲ 6 escalations this year · 34 machines behind on updates

\$3,900 a month, 229 seats

TARGET PRICE · SCOPED TOGETHER

▲ NOT COVERED

02

Security awareness training

Your people reported 27 suspicious messages with no program behind them. Training turns that instinct into a habit you can measure.

▲ 27 staff reports · no phishing test on record

\$690 a month

TARGET PRICE · SCOPED TOGETHER

▲ NOT COVERED

03

Continuity site

Both domain controllers sit in the Northgate server room. If that room is unavailable, recovery depends on hardware in the same building.

▲ 18 protected systems · 1 site

\$1,450 a month

TARGET PRICE · SCOPED TOGETHER

The road ahead

WHAT & WHY	INVESTMENT	STATUS
FY26 Q2		
Technology roadmap Documents what your fleet already shows: aging machines and lapsed warranties across the fleet chapter.		● LET'S DISCUSS
Firewall replacements The firewall itself carries an expired warranty today, per the fleet detail page. 3 devices · Northgate, Millbrook	\$11,400	● NEEDS APPROVAL
		QUARTER TOTAL \$11,400
FY26 Q3		
Server replacement Addresses end-of-life infrastructure ahead of the domain controllers reporting offline this window. 10.24.6.40 · LPPMBDC01	\$34,800	● NEEDS APPROVAL
		QUARTER TOTAL \$34,800
FY27 Q1		
Workstation replacement Targets machines already flagged out of warranty in the fleet count, in progress this quarter.	\$2,600	● NEEDS APPROVAL
Resume 6 protected systems with backup paused IMG01		● NEEDS APPROVAL
		QUARTER TOTAL \$2,600
FY27 Q2		
Cedar Hollow server replacement The Cedar Hollow server is over six years old and still runs an aging system, per the lifecycle notes.	\$15,200	● NEEDS APPROVAL
		QUARTER TOTAL \$15,200
8 roadmap items, 6 printed here. The total below includes every one.		
Priced items summed, one-time and recurring kept separate. The unpriced rows we'll scope together.		\$236,500

Five quarters of IT spend on one page

What you already pay under agreement, the roadmap work ahead, and the replacement backlog, side by side by quarter.

	FY26 Q2	FY26 Q3	FY26 Q4	FY27 Q1	FY27 Q2	TOTAL
■ Agreements and licensing	\$84,300	\$84,300	\$86,900	\$86,900	\$86,900	\$429,300
■ Roadmap initiatives	\$11,400	\$34,800		\$2,600	\$15,200	\$64,000
■ Replacement backlog	\$18,700	\$18,700	\$12,400	\$9,800	\$9,800	\$69,400
PER QUARTER	\$114,400	\$137,800	\$99,300	\$99,300	\$111,900	

▲ OVERDUE

\$14,900 of replacement work is past its planned date, all of it workstations already flagged out of warranty in the lifecycle chapter.

● NOT YET SCHEDULED

\$31,200 of identified replacement work has no quarter yet, including the two servers still on an unsupported operating system.

Five quarters, with agreements and one-time work kept separate in the rows above

\$562,700

What has to be true before AI helps

Four measures decide whether AI can do useful work here: who your people are, what they work on, how careful they are, and what you are licensed for.

AI READINESS

61 / 100



4 of 4 measures read from your record

The score is the plain average of the four measures below, each scaled to 100. A measure we cannot read is left out rather than counted as a zero, and the line above says how many were read.

AT A GLANCE

Your identity layer is nearly there: 208 of 229 accounts sign in with a second factor, and the last 21 are already on the plan. Devices are the drag, with three servers on a system nobody supports any more and 206 machines past warranty. Your people are careful, which matters more than any tool. The licensing decision has not been made yet, and it is the only one of the four you can settle in this meeting.

IDENTITY

🟡 ALMOST

91%

208 of 229 accounts sign in with a second factor.

DEVICES

▲ NOT YET

3 of 371 on an unsupported system

Unsupported systems cannot take new tooling, and 206 machines are past warranty.

PEOPLE

🟡 ALMOST

12% phish-prone

12% clicked the last simulated test, and 78% of assigned training is current.

ADOPTION

▲ NOT YET

0 of 229 seats

No Copilot seats yet, so the first pilot is a decision rather than a change.

Practices your size in our book sit at a median of 58 on the same four measures.

FIRST STEP

Start with the 21 accounts still signing in without a second factor. It is the cheapest of the four to close, and every AI tool you might turn on depends on it.

Give your team their time back

A low-lift place to start: hours back each week with tools you can turn on now, and a look at where you stand against practices your size.

THE AI OPPORTUNITY

12,428 hours back a year Worth about \$472,500 a year, starting with Microsoft Copilot across your 229 people.

229 people × 1 h/week × 52 weeks = 11,908 hours, plus 10 h/week × 52 from 4 more plays = 12,428 h · about \$472,500 at \$38/h

4% of similar-sized practices have started with Copilot. You have not started yet.

WHERE IT PAYS OFF

Microsoft Copilot, integrated for your people ~229 HRS/WK

Notes, emails and summaries draft themselves inside the tools you already own: hours back each week, nothing new to learn.

Automating the manual work ~4 HRS/WK

The re-keyed forms and copy-paste steps become flows that run themselves: fewer errors, faster turnarounds.

HOW ADOPTION WORKS

- 1 Pick the one play with the clearest payoff.
- 2 Pilot it with a single team for a month.
- 3 Measure the hours gained before rolling it wider.

Custom software for a real business issue ~2 HRS/WK

Where off-the-shelf falls short, a small purpose-built app removes the workaround entirely.

Dashboards that answer the Monday questions ~1.5 HRS/WK

The numbers leadership asks for live on one screen instead of four exports. Better decisions, faster.

Instant answers, with guardrails ~2 HRS/WK

Staff ask in plain English about policies, procedures and how-tos, and get your own answer, not the internet's.

Estimated at \$38/hr of front-office time, a starting figure we scope together rather than a commitment.



Dana Whitfield

Your account manager since 2021

Direct **dana.whitfield@itpartners.com**
 Your pod **Pod 3 · four engineers**
 Cadence **Monthly touchpoint**
 Next review **December 15, 2026**

IN THEIR WORDS

"The response time is what changed for us. Somebody picks up, and they already know which clinic I am calling from."

"You handled the Cedar Hollow move over a weekend and we opened Monday like nothing had happened."

● A friction, and what we changed

"It took three calls to get the imaging viewer sorted in March." · True, and it took us too long. The viewer went into the pod's runbook on March 24, and the four tickets since have closed on first contact.

Decisions we need, by when

4 answers we need, each with the date we need it by.

Resume the six paused backups

Answer needed by October 3 · your call, our work

Renew, replace or self-insure the 206 out-of-warranty machines

Answer needed by November 14 · finance and clinical leadership

Approve the FY26 Q3 server replacement

Answer needed by November 28 · \$34,800

Name the team for a 15-seat Copilot pilot

Answer needed by December 15 · your call

Forward Thinking. Relationship Driven.

Every figure in this review regenerates nightly from your own records, so the next one starts where this one left off. Thanks for allowing us to serve you.