MIPLY

MIPLY PLAYBOOK

The AI and Automation Playbook for Modern MSPs

How to become a Managed Intelligence Provider

Turn AI into recurring, monetizable revenue from clients you already serve.

MIPLY · Intelligence. Useful.

A Note Before You Start

If you run an MSP, you've already heard the question.

A client mentions AI in a QBR. A prospect asks what your “AI strategy” is. Another vendor sends one of your accounts a deck about automating operations. You answer as best you can, then go back to running the business.

Here's the uncomfortable part: that conversation is going to be answered by someone. The question is whether it's you, or the next vendor in your client's inbox.

This playbook is the blueprint MIPLY uses with MSPs to capture that conversation, not by selling AI as a product, but by turning it into a productized, outcome-driven service motion that runs on top of the MSP business you already have.

We're not a tool vendor. We're not a dev shop. We help MSPs turn AI, automation, and data into real outcomes their clients are willing to pay for.

If any of that resonates, keep reading. If it doesn't, save it for the next person on your team who's been thinking about this.

The MIPLY Team

Part 1. The Shift: MSP to MIP

The conversation is already happening inside your client base.

Every MSP we talk to hears some version of it: a client wants their AI strategy explained, an operations leader wonders if invoice processing could be automated, a CFO mentions a vendor that pitched them on “AI for finance.” The question isn't if this reaches your accounts. It has. The question is who answers it.

When you don't have a structured answer, one of three things happens over the next 12 to 36 months: a second vendor gets invited into your client's operations to do the work you couldn't package, that vendor starts asking about underlying systems and data, territory you historically owned, and over time they become the “strategic” partner while you become the “infrastructure” partner. Margin compresses. Wallet share shrinks.

What an MIP actually is.

The category is converging on a name: MIP, Managed Intelligence Provider. It's not a new tech category. It's a business-model upgrade. The best MIPs still manage infrastructure. They do not lead with it. They lead with business outcomes and pull infrastructure along as the delivery mechanism.

The three things clients are actually paying for.

When a client says “I want an AI strategy,” they almost never mean that literally. They mean one of three things, and knowing which one changes how you price, package, and deliver.

- **Cost avoidance.** “Can I stop hiring for this role?” Easiest sell, a clean dollar-for-dollar comparison to a loaded salary.
- **Revenue growth.** “Can I close more deals or retain more customers?” Highest margin, because outcomes are measured in new or retained revenue.
- **Compliance and risk.** “Can AI help us pass an audit or certification?” Less glamorous, massively durable recurring revenue.

Selling “AI” as a generic offering loses, because the client can't evaluate it. MIPs sell one of these three as the entry point, then expand inside the account.

Part 2. The Four Traps Most MSPs Fall Into

Before the model works, it doesn't. Not because any single approach is “wrong” in isolation, but because all of them stop short of the thing that actually matters: turning AI into a repeatable, productized, outcome-based service motion with the MSP at the center.

Trap 1. Reselling AI licenses. Adding Copilot, ChatGPT Enterprise, or similar to the MSP catalog. Clients can buy the same thing on their own, and increasingly do. The MSP adds no value as middleman.

Trap 2. Bundling a tool with a security wrapper and calling it an “AI package.” Clients don't want a tool package. They want a problem solved. Even with a security layer, that doesn't move a line item on the client's P&L.

Trap 3. Hiring an AI consultant and billing hourly. A margin disaster. The MSP does the expensive discovery. Someone else captures the implementation revenue.

Trap 4. White-labeling an automation platform. You're at the mercy of someone else's roadmap. When clients have a problem, you can't fix it, you can only open a ticket.

The pattern in all four: the MSP is still trying to add AI as a product. Nothing works until you stop selling AI as a product and start selling it as a productized service motion, where the MSP owns the outcome, the process, and the relationship end to end.

Part 3. The MIPLY 5-Phase Framework

This is not a generic maturity model. We started as an MSP ourselves. We built these five phases inside our own MSP and ran them on our own business first, starting with our accounts receivable desk. When MSP peers kept asking how we did it, we created MIPLY so other MSPs could replicate that success. Same five phases, applied consistently across Sales, Marketing, Finance, and Operations, and that consistency is what makes it something you can package and sell.

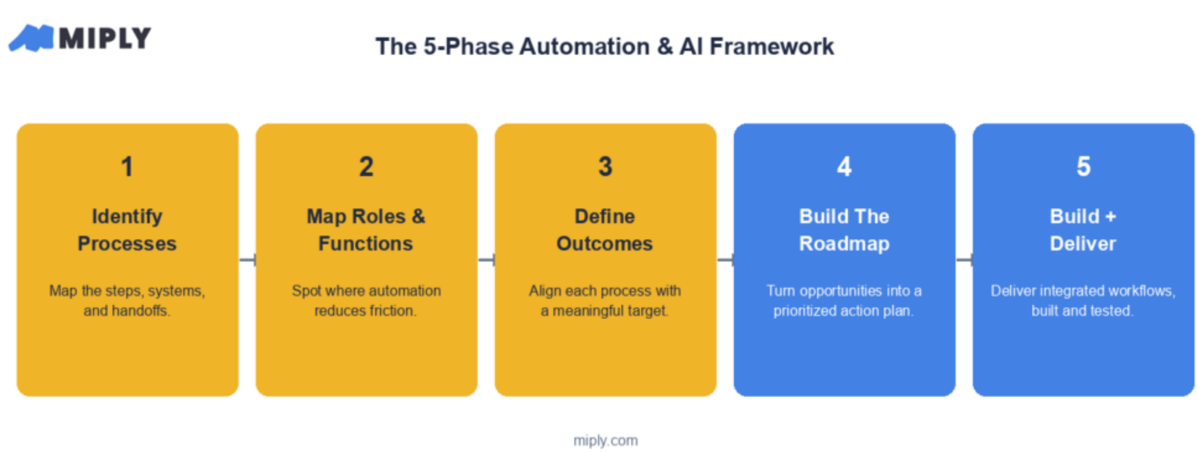
Phase 1. Identify Processes. Map the steps, systems, and handoffs. Deliverable: a current-state process map with friction points and cost attribution.

Phase 2. Map Roles and Functions. Identify who performs, reviews, and owns each step. Deliverable: a role map with augment, automate, or leave-alone designations.

Phase 3. Define Outcomes. Translate process and role insight into business outcomes the economic buyer cares about (DSO reduction, ticket deflection, pipeline lift). Deliverable: an Opportunity Scorecard with a named outcome, an estimated dollar value, and a go or no-go recommendation.

Phase 4. Build The Roadmap. Turn the opportunities identified in Phases 1 through 3 into a prioritized action plan: which workflows get automated first, in what order, and why. Highest-ROI, lowest-complexity candidates go first, invoice matching, ticket triage, data extraction, and scheduling are common early picks. Deliverable: a phased roadmap prioritizing 2 to 4 workflows by ROI and complexity.

Phase 5. Build + Deliver. Build, test, and deliver the automations and any AI layer as one integrated, tested system, not a bolted-on tool. AI layered onto a messy, undocumented process just automates the mess faster, that's why this comes last, not first. Deliverable: 1 to 3 deployed, tested workflows plus a measurement framework.



Part 4. A Real Result: The AR Transformation

This isn't our own shop. It's a client engagement, run using the same 5-phase process above.

The client: a confidential mid-market professional services firm working across management consulting, compliance advisory, and outsourced HR. Like most firms that grow past the point where a spreadsheet works, their accounts receivable process had never been redesigned, it had just accumulated. A six-person department ran the entire invoicing and collections cycle by hand, raising invoices, chasing approvals, reconciling payments against bank deposits, and following up on anything overdue. Nobody built it that way on purpose. It grew one hire at a time as volume increased, until AR was one of the largest line items in the back office and one of the least examined.

Phase 1 (Identify Processes) mapped the full invoice-to-cash cycle and found the pattern most manual AR desks share: multiple handoffs between whoever raised an invoice, whoever approved it, and whoever chased payment, with no single owner for a file end to end.

Phase 2 (Map Roles and Functions) separated the steps that needed real judgment, payment disputes, credit holds, from the steps that were pure repetition: invoice generation, reconciliation matching, standard follow-up.

Phase 3 (Define Outcomes) set the target the CFO actually cared about: lower operating cost without adding collections risk, and free up staff time for higher-value work rather than simply cutting the department.

Phase 4 (Build The Roadmap) prioritized invoice generation and payment reconciliation first, the highest-volume, most repetitive, lowest-complexity candidates in the process.

Phase 5 (Build + Deliver) shipped both as one integrated system: a MIPLY Digital Worker handling the repetitive volume, with one remaining team member managing exceptions and judgment calls.

No layoffs. Five of the six AR staff moved into revenue-adjacent roles inside the same firm. The sixth stayed on AR, now managing exceptions instead of every invoice.

$368,040 saved every year. Five jobs preserved, not cut.

Metric	Before	After
AR Department Headcount	6 FTE	1 FTE + 1 Digital Worker
Annual AR Operating Cost	$493,840	$125,800 (74.5% lower)
Freed Cash Flow	n/a	+$312,000 per year
Cost Recovery	n/a	7 months

Part 5. Two Ways to Work With MIPLY

MIPLY Guild

AI Readiness and Monetization Plan, Sales and Messaging Toolkit, biweekly Peer Groups, MIPLY-backed SOWs, project execution support from MIPLY's delivery team. Sell AI immediately. MIPLY delivers behind the scenes.

MIPLY Forge

Everything in Guild, plus co-development with MIPLY engineers, internal and client builds, architecture validation, hands-on capability transfer. Faster go-to-market. Your team builds full internal capability.

Your First 30 Days

Week 1. Onboard onto the MIPLY platform and complete your MIP readiness assessment. Identify the senior delivery person who'll own this, a senior delivery engineer, vCIO, or account director who can sit in front of a CFO, COO, or Owner.

Week 2. Identify one existing client with a high-volume, repetitive workflow and begin Phase 1 (Identify Processes) using the platform.

Week 3. Complete Phases 2 and 3 (Map Roles, Define Outcomes), generating your assessment output directly from the platform instead of a blank page.

Week 4. Present your findings and proposed roadmap to the client, position your first Digital Worker, and close your first intelligence-layer service contract.

> **Target: first MIP service revenue within 30 days of joining the Guild.**

Ready to Grab the Marker?

Schedule your free discovery call. It's 30 minutes with a MIPLY operator: we'll look at your top 5 clients together, identify the most promising AI and automation opportunities, and sketch what the first 90 days would look like in your shop specifically.

No demo. No pitch deck. Just a marker, a whiteboard, and a real conversation about what's possible.

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