

The MSP Guide to a Low-Friction Prospecting Workflow

Convert Prospects Faster with a Smarter Three-Stage Workflow

Cold outreach alone isn't enough. MSPs are winning with a simple three-stage workflow using two quick risk assessments—a fast Domain Scan to spark interest, then a detailed Human Risk Report (HRR) to prove risk (if needed). Use this guide to start converting prospects faster and growing your business today.



The Initial Setup: Your Ready-Made Call to Action

To start, set up a [CTA widget](#) on your website or marketing channels.

- **Tip:** Use [ready-made assets](#) to embed a “free human risk assessment” widget.
- **Benefit:** This creates low-friction inbound leads and primes conversations around security risk. Position this as a no-obligation, value-first offer your prospects can engage with anytime



Step 1. Convert: Reveal Prospect Risk Instantly with a Domain Scan

Use the Domain Scan to deliver fast, compelling exposure insights.

- **Step:** Use the [Domain Scan](#) to deliver fast, compelling exposure insights. Identify breached credentials linked to the prospect's domain in seconds.
- **Tip:** No installs or data entry needed—just real, visual results that open conversations. When a prospect requests the free assessment, generate and share the [domain breach scan report](#).
- **Benefit:** Use this to educate prospects, spark urgency, and position your MSP as proactive and insightful.



(Optional) Step 2. Validate: Prove Deeper Risk with a Full Human Risk Report

Only needed if the prospect requires more risk insight to progress.

- **Step:** [Create a new prospect](#) in uService by adding their email address and domain — this automatically launches the Human Risk Report process (or you can choose to start it manually later).
- **Tip:** Present the resulting branded, easy-to-understand report to business leaders, highlighting breach exposure and phishing simulation results. Use these findings to educate the prospect on risks and guide next steps.
- **Benefit:** Positions the HRR as a commercial asset that clearly communicates HRM's value and builds a stronger case for your security service.



Step 3. Enrol: Demonstrate Your Service Value and Convert

- **Step:** Move from assessment to action with a free trial or direct billing.
- **Tip:** Offer a free trial to show ongoing value and build trust. Or, if the prospect is ready, convert them straight to a paying client.
- **Benefit:** Use your insights from the Domain Scan and HRR to tailor onboarding and [upsell opportunities](#).

Best Practices to Drive Success

Do This	Why It Works
Clearly explain the 3-stage workflow	Builds trust, reduces confusion around tools.
Get permission early for user uploads	Keeps the process moving without delays
Use automated updates and notifications	Maintains momentum and professionalism.
Position assessments as free, high-value audits	Increases perceived value and urgency
Focus on what the reports reveal, not how they're generated	Helps non-technical stakeholders grasp risks

Bonus: Ready to Upsell? Introduce [Continuous Monitoring](#)

When prospects see their exposure, many will want ongoing visibility. Use this opportunity to offer continuous breach monitoring, positioning your MSP as their long-term security partner.

From Scan to Sale—Every Time

This simple, low-friction workflow helps MSPs:

- Open more doors with a free, no-strings risk assessment.
- Prove the need for action with clear, personalised insights.
- Convert faster by educating prospects and guiding next steps.