


# Holiday Risk Matrix *worksheet*

Use this worksheet to help the service team clarify which clients actually create holiday risk instead of assuming everyone needs full coverage. This supports better PTO planning, fairer rotations, and calmer December conversations.

## SECTION A: Holiday Context

*(Complete once per holiday period)*



**Holiday or Date Range Being Analyzed:**

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**Year:**

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**Team Completing This:**

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### 1. Expected Coverage Level for the MSP:

Check:

- Closed (no staff on-site)
- Lightly staffed
- Remote monitoring only
- Fully open
- On-call rotation

### 2. Notes on MSP-wide commitments (projects, migrations, compliance deadlines):

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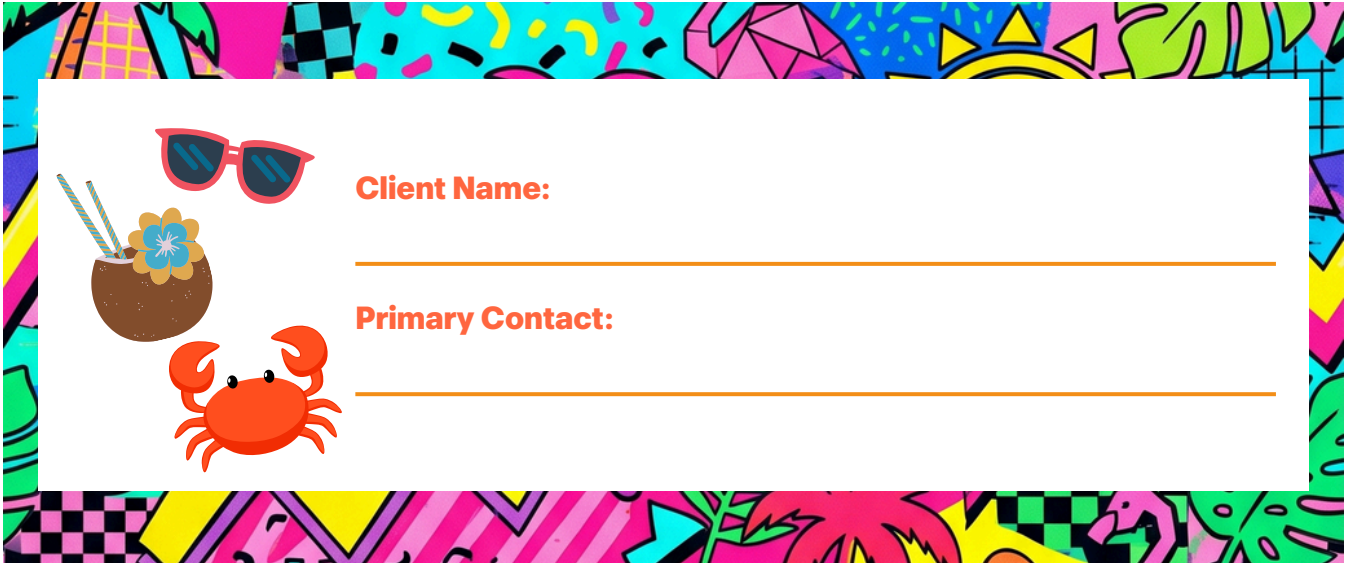
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## SECTION B: PER-CLIENT RISK ASSESSMENT

(Fill one block per client. Print 1 Copy of Section B Per Client)



**Client Name:** \_\_\_\_\_

**Primary Contact:** \_\_\_\_\_

### 1. Are they open or closed during this holiday?

Use what they actually do, not what their website claims.

- 👉 Fully Closed (Status Score 0)
- 👉 Partially Closed or Executives Working (Status Score 1)
- 👉 Fully Open (Status Score 2)

Status Score: \_\_\_\_\_

### 2. Does this client deliver emergency or 24/7 services to their own customers?

- 👉 No (Emergency Score 0)
- 👉 Sometimes or Situational (Emergency Score 1)
- 👉 Yes, always (Emergency Score 2)

Emergency Score: \_\_\_\_\_

### 3. Historical support demand for this holiday period

Use PSA data if possible. Team memory is acceptable if data is unavailable.

Year Tickets Logged Any critical or urgent issues

Year 1: \_\_\_\_\_ Yes / No

Year 2: \_\_\_\_\_ Yes / No




Year 3: \_\_\_\_\_

Total Tickets, 3 Years: \_\_\_\_\_

Number of Major Incidents: \_\_\_\_\_

#### 4. Helpdesk Gut Likelihood Score




How likely are they to actually contact you during this holiday period  
Use a 1 to 5 scale.

-  1 = Very unlikely
-  3 = Could go either way
-  5 = Very likely

Likelihood Score: \_\_\_\_\_

#### 5. Impact Score

If something breaks, how bad is the impact  
Use a 1 to 5 scale.

-  1 = Low impact
-  3 = Medium business disruption
-  5 = High financial, operational, or safety impact

Impact Score: \_\_\_\_\_

#### 6. Calculate the Client Holiday Risk Score

Risk Score = Likelihood Score + Impact Score + Status Score + Emergency Score

Final Risk Score: \_\_\_\_\_

#### 7. Risk Category

Check:

- Green (0 to 5): Low risk
- Yellow (6 to 8): Medium risk
- Red (9 to 12): High risk

#### 8. Proposed Coverage Recommendation

Choose one and add notes if needed.

- No coverage needed
- Monitoring only
- On-call availability
- On-call, escalations only
- Priority coverage or guaranteed response



## SECTION C: TEAM SUMMARY

(Complete after all clients are rated)



**Total Clients Rated:** \_\_\_\_\_

**Green:** \_\_\_\_\_

**Yellow:** \_\_\_\_\_

**Red:** \_\_\_\_\_

### Summary Observations

1. Which clients create most of the holiday risk?

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2. Which days or hours appear riskiest?

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3. Are staffing expectations reasonable based on risk?

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4. Does the current PTO approval approach fit the risk profile?

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## SECTION D: PROPOSED TEAM COVERAGE PLAN

### 1. Recommended staffing level

Check one or list specifics.

- Fully off
- One person on-call
- Two person rotation
- Half-day staffing
- Full-day staffing

### 2. Proposed rotation schedule:

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### 3. Proposed adjustments or approvals based on the risk map:

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### 4. Suggested conversation script for management:

***"Here is a summary of client risk during the holiday period based on client status, historical ticket behavior, and emergency likelihood. We created a recommendation for coverage that matches actual risk. This approach allows us to protect SLAs, reduce burnout, and approve PTO more fairly."***

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