

QBR

TEMPLATE

Most QBRs are a dashboard recap wearing a meeting invite. This template runs the review against the customer's own definition of success instead – the same comparison from Chapters 6 and 9 – with operational metrics present but no longer the headline.

“Not a survey, not a Quarterly Business Review agenda item. One question, asked directly, then the discipline to shut up and write down what they say.”

The success question deserves its own moment, not a bullet buried on slide four. Ask it before you open the deck.

ACCOUNT

Customer

Quarter

Executive attending (the person whose confidence keeps you in the account)

Current stage (Win / Transition / Stabilize / Expand / Renew)

Before the meeting – internal prep

- ☐ Pull last quarter's answer to the success question, if one exists. If none exists, this quarter's job is to get one.
- ☐ Note where this account sits on the Five Stages road, and whether that's moved since last quarter.
- ☐ Have Sales, Delivery, and Leadership each write – independently – what they believe success looks like for this account.
- ☐ Identify one point of friction from this account's last 90 days worth naming in the room.
- ☐ Pull the operational metrics. Have them ready, but plan to spend less time on them than usual.

What Sales believes success looks like	
What Delivery believes success looks like	
What Leadership believes success looks like	

In the room – meeting agenda

1. OPEN WITH THE SUCCESS QUESTION

Before tickets, projects, or the roadmap, ask it directly:

“If this relationship is wildly successful, what does success actually look like for you?”

If you've asked before, ask again – success changes. Write their answer word for word. Do not summarize it or convert it into a metric.

Their answer, in their words

- ☐ Same as last quarter's answer
- ☐ Changed since last quarter – note what shifted

2. REVIEW AGAINST THEIR DEFINITION, NOT YOUR SCORECARD

Walk through the quarter using their words as the yardstick – not your internal metrics as the agenda.

Where did we deliver on what they just described?

Where did we fall short of it, regardless of what our scorecard said?

3. OPERATIONAL METRICS (BRIEF)

Cover SLAs and operational performance – compliance keeps the contract alive, it just isn't the headline anymore.

SLA / operational summary

4. SURFACE FRICTION

Ask directly: what's been harder than it should be to work with us this quarter?

Friction named

Owner for removing it

5. CONFIDENCE CHECK

Confidence moves before the reports do. Ask or observe:

- ☐ Who on their team calls us first when something matters?
- ☐ Are there side conversations happening that we're not part of?
- ☐ Do our reports get opened, or politely ignored?

6. LOOK FORWARD

What would make next quarter wildly successful for them?

After the meeting – internal follow-up

Lay the four answers side by side and read them together.

Customer's words (from this QBR)	
What Sales sold them	
What Delivery believes	
Gap identified? (Y/N + where it's leaking)	

Don't let this happen

- Don't let the deck open the meeting – the success question opens the meeting.
- Don't translate their words into your metrics before you write them down.
- Don't let green SLAs end the conversation – compliance and confidence are two different questions.
- Don't skip this because the account "looks fine." The accounts that look fine are the ones where confidence gets spent quietly.

Want help redesigning your QBR process across every account, not just this one? Book an Outcome Execution Gap Session.
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