



QBR Review Guidelines

Businesses want to buy from industry leading suppliers because they want to be best-in-class. No one wants to buy from an inferior vendor yet far too often a customer believes they're forced to settle for one. Good enough is not good enough anymore in today's competitive environment of supplier availability, superiority and eased exposure due to social media. Customers expect companies to not only provide a service, but contribute to their overall business success. For example, can your team provide insight on how to improve your customers process or product? Do they know how to talk about industry trends and business opportunities or are they just asking for quotes and taking orders?

The objective of a QBR is to develop a customer-centric relationship that will promote partnership and a deeper knowledge within your key accounts. During these reviews strategic objective are discussed to ensure your business is in alignment with your key customers growth goals, and actionable activities are established to hold both sides accountable.

The first step in the customer QBR process is to develop a line of questioning that helps you best understand the current state of their business. **Talk to these customers and get to know them**; build a relationship with them. Here are potential lines of questions that should be covered:

- How is business?
- Discuss any supply issues, or current gaps they have in the supply chain.
 - For example: We really need a supplier that can also do value added assembly
- Forecast future product demands
- Possible risk or impacts to current business.

Key Discussion Points

CONTRIBUTE TO YOUR CUSTOMERS OVERALL GROWTH

TALK TO YOUR CUSTOMERS TO GET TO KNOW THEM

ALIGN YOU BUSINESS WITH THEIR STRATEGIC INITIATIVES

DEVELOP A PLAN FOR JOINT GROWTH

BUILD A SHARED VISION

Are there upcoming issues or strategic initiatives that you can support? Identify ways that you can help to support their goals, and define actionable plans with established deliverables where you can aid in their success.

Your best customers will have a deep understanding of the things that make it easy to work with you and what make it a challenge to work with you as well. Look to them to understand what you do well and where improvements are needed. Here are potential topics that should be covered:

- How are you performing for them?
- Talk about KPI performance



How are your customers planning to grow their business? By discussing new business development opportunities you can better understand how you can support their growth. Perhaps you can become an increasingly valued partner by investing in a service or capacity that will not only facilitate growth for your existing client, but give your business future growth potential. Others are sure to have this need as well!

With everything discussed during your review, use this to create key account activities, with an associated action plan that establishes a clear path with assigned resources and due dates to complete mutually agreed upon objectives.

Build a Shared Vision:

The Quarterly Business Review will help you create a strategic plan that should be understood by everyone in both your organization, and that of your client. Everyone involved should understand the direction and more importantly, the reasoning behind the shared strategy. This is key to developing a customer-centric mindset and building a relationship that can not only meet but exceed expectations.

Free QBR Template

Looking to build a QBR process? [Click Here](#) for our free starter tool to help you begin your journey.

At KALLAN Sales Development, we work with our clients to supports the development of account strategies tailored specifically to the needs of your customers. [Contact us](#) today to see how we can create a custom solution for you.

www.kallansalesdev.com