

Streamlining Quarterly Business Reviews



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Streamlining Quarterly Business Reviews



Jeff Breunsbach - Director, Corporate Marketing @ Higher Logic / Co-Founder @ Gain Grow Retain

“The drag with QBRs often boils down to scrambling for data and wrangling slides”.



It doesn't matter whether you call them QBRs (Quarterly Business Reviews), EBRs (Executive Business Reviews), or just plain old Account Reviews.

Whatever you call them in your business, you know that they can be time-consuming to prepare, frustrating to organize, and that the mere mention of them can send shivers down the spines of your CSMs. That said, QBRs are an essential part of most customer journeys - so there is no getting away from them.

If you're unfamiliar with the concept, they're essentially a regular review meeting with your customer to look at their performance and progress with your product, as well as setting mutually agreed goals and discussing strategies.

If you don't make the most of these QBR meetings, they can quickly become a burden for your customers and a time drain on your CSM.

So, to help you and your CSMs save time and ensure you're preparing a QBR that has value for your customers, we've outlined some common time-sapping challenges you might be facing and solutions you can implement with CSP technology.

Coordination and Scheduling

At this stage, you know you need to do a QBR with one of your customers.

This might be because you've noted it somewhere, but because of your messy manual processes, there's a risk that your customer might have asked you for one!

Either way, the challenge now is for your CSM to coordinate a time that works well for everyone involved. Navigating time zones, schedules, and conflicting priorities means that this can become something of a logistical nightmare.

Not only is this frustrating for your CSM, but it's time-consuming for everyone involved and isn't the smooth and easy experience you should be aiming for with your customers.

Why QBRs Can Be Time-Consuming



Data Aggregation



James Stuart - Senior CSM @ Hackajob

“It is important to gather the data the customer actually cares about and relates to the customer’s internal metrics - rather than vanity metrics”.



OK, so after much back and forth, your CSM has set up an appointment for a QBR next week.

Sounds great, but what are they going to talk about?

To make sure you’re adding value to your customers, you’re going to need to take a data-driven approach.

The trouble is that in order to get a total view of your customer’s experience with your product so far, you’ll need to gather intel and insights from multiple sources like:

- ✓ CRM systems
- ✓ Support ticket systems
- ✓ Customer surveys for things like CSAT and NPS
- ✓ Product usage data

Doing this manually will likely take your CSM hours to complete. It’s not an effective use of your CSM’s time.

Slide Deck Preparation

Once your CSM has spent way too much time battling your internal data silos to track down all the various strands of information you hold about your customers - they're going to need to make it presentable.

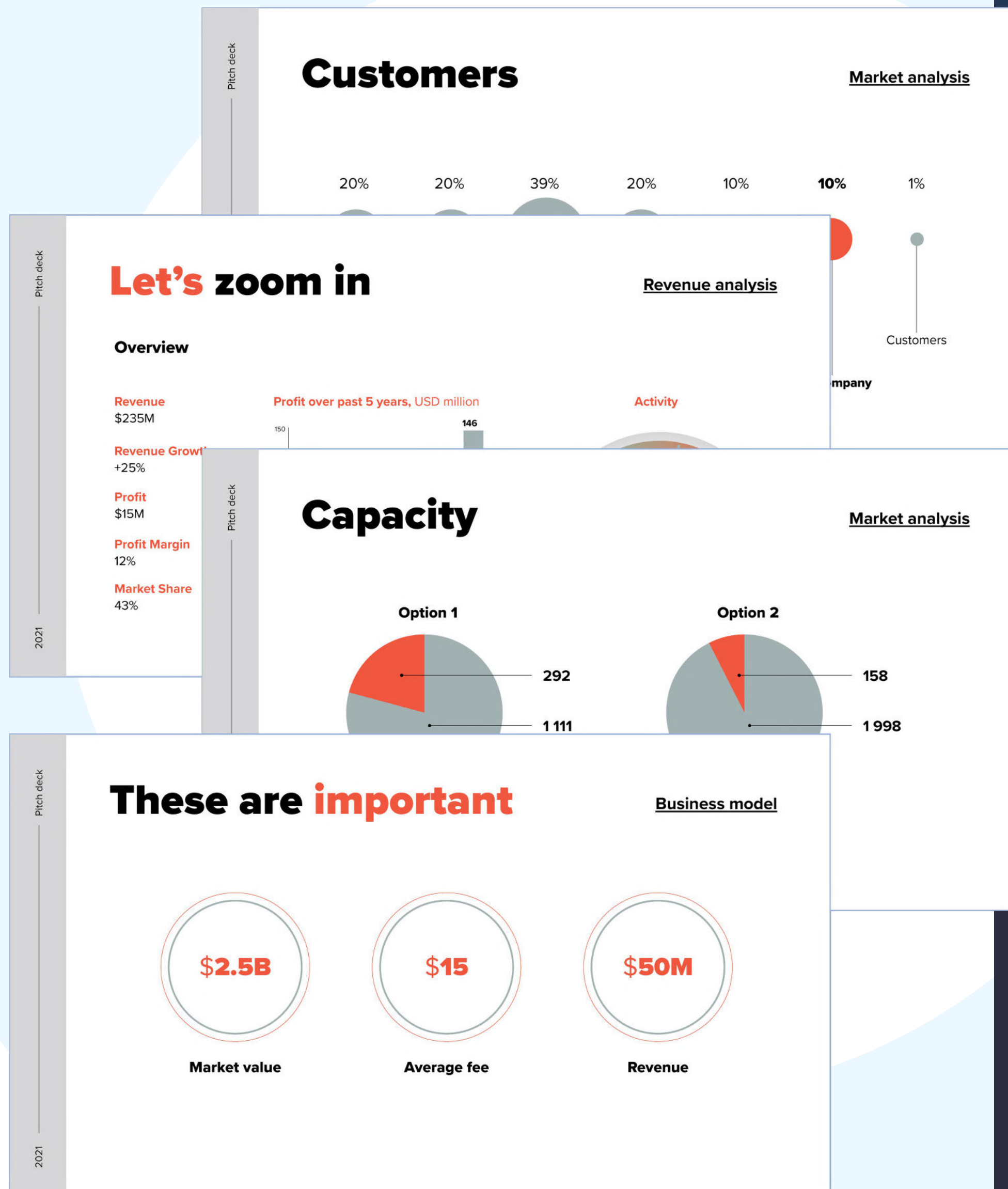
Typically, this involves preparing a slide deck to turn all the raw data into an easily digestible format.

As a result, this slide deck needs to be jam-packed with things like:

- ✓ Graphs,
- ✓ Charts,
- ✓ Visual breakdowns of various KPIs.

All of which tend to be incredibly time-consuming to prepare.

Again, you have to ask yourself, is your CSM's time being used effectively if they need to spend hours pulling together a slide deck?



Customers Market analysis

20% 20% 39% 20% 10% 10% 1%

Let's zoom in Revenue analysis

Overview

Revenue \$235M

Revenue Growth +25%

Profit \$15M

Profit Margin 12%

Market Share 43%

Profit over past 5 years, USD million

150 146

Activity

Capacity Market analysis

Option 1

Option 2

292 1111

158 1998

These are important Business model

\$2.5B

Market value

\$15

Average fee

\$50M

Revenue

Making QBRs More Efficient With Technology

Automated Data Collection

One of the immediate benefits of using CSP technology to help you with your QBR preparation is automated data collection.

You can easily integrate a customer success platform with any of your other systems, including:

- ✓ CRM
- ✓ Support portal
- ✓ Survey tools
- ✓ Platform analytics

This integration then gives you instant access to real-time data from across your technology infrastructure - helping data silos to become a thing of the past.

Because all the data you'll need for your QBR preparation - and lots more besides - is all available at the click of a button in your CSP, it means your CSMs can save bundles of time by aggregating data automatically and building a 360-degree view of the customer in seconds.



More than 19 in every 20 CX leaders have invested, or plan to invest, in data integration, data integrity, or data enrichment technologies.

CX Today



Estimated time saved: 2-3 hours per CSM per week.

Pre-Built Templates

Not only can a Customer Success Platform help to take away the pain of sourcing the various strands of data you need to produce a QBR slide deck..., but it can also help you to produce the actual slide deck, too!

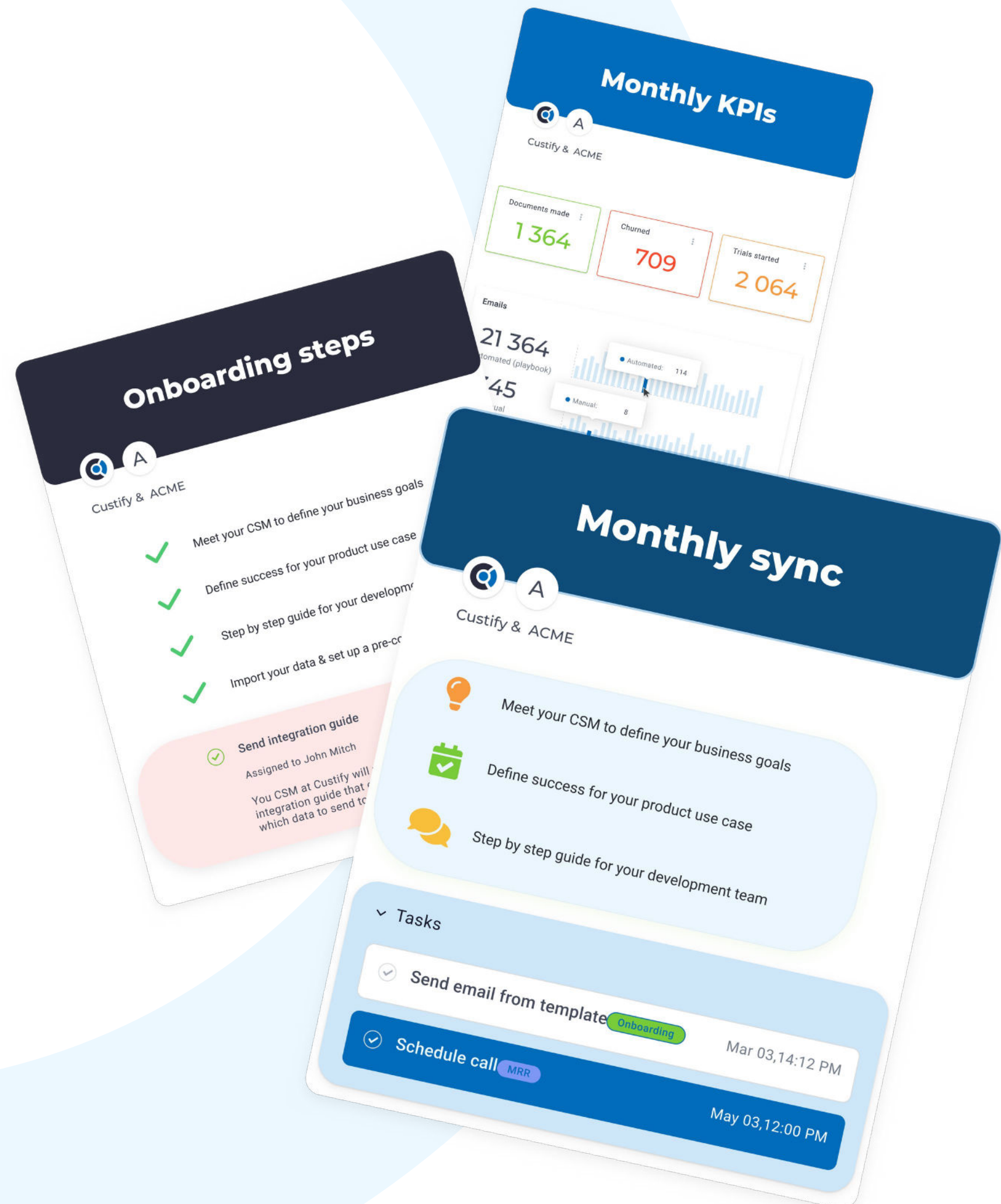
This is because many CSPs feature pre-built QBR templates that can be further customized to fit your specific needs.

These templates will often come ready to go full of pre-configured charts and graphs, allowing you to plug in your data easily - and save a bunch of time as a result.

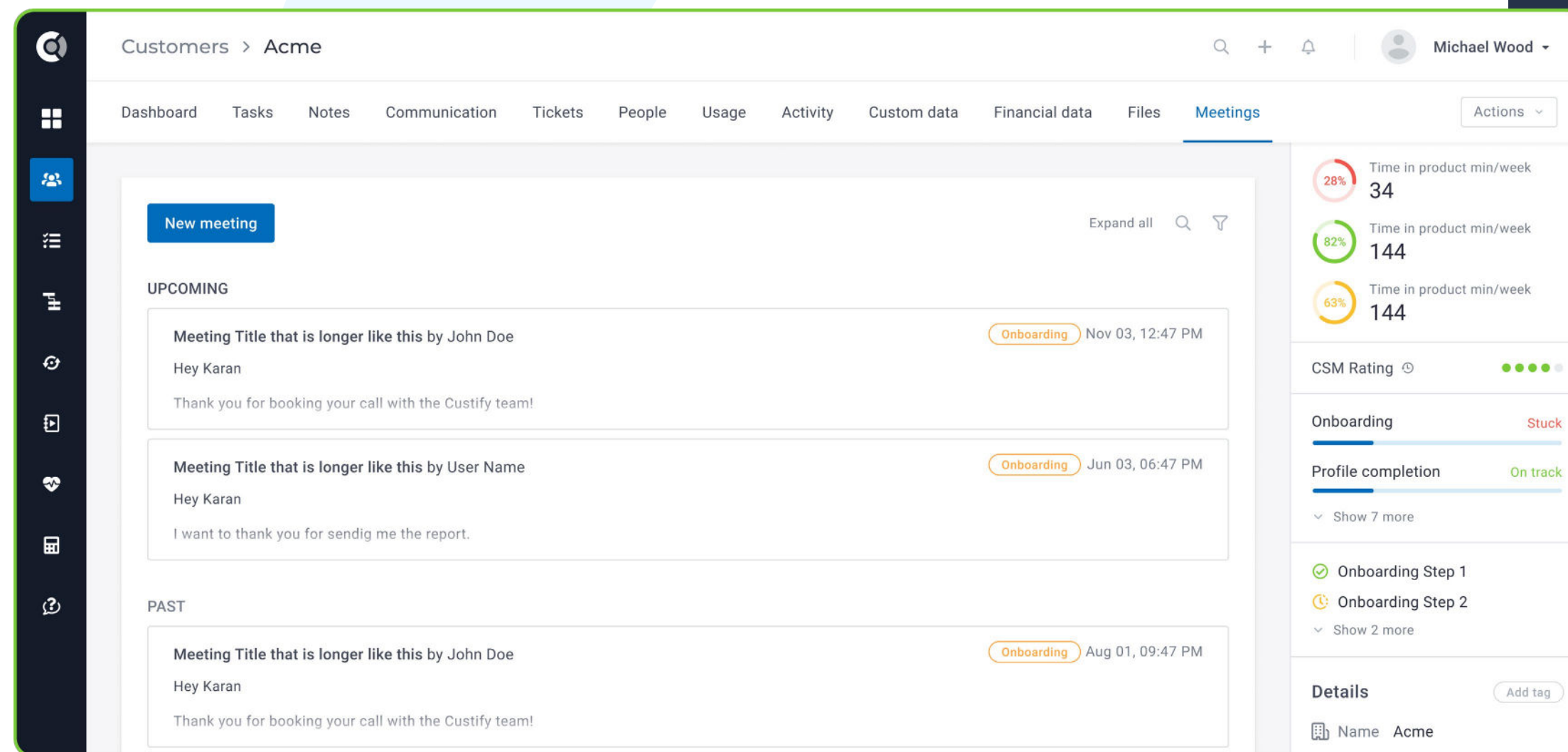
Having ready access to pre-built QBR templates that can easily sync with all your customer data not only speeds up the slide deck preparation process but also ensures your CSMs will deliver a consistent and professional presentation every time.



Estimated time saved: 7 hours per CSM per week.



Scheduling Assistants



We all know how frustrating it can be to play 'meeting tennis' with customers - going back and forth between your calendar and theirs until you find a winning time and date.

Thankfully, some of the more advanced customer success platforms can help you and your team to overcome this scheduling nightmare. By including features like:

- ✓ Calendar invites,
- ✓ Meeting reminders,
- ✓ Rescheduling options,

CSPs take the hassle out of finding a time that works for everyone - and offer a more streamlined and professional experience for your customers.



Estimated time saved: 1-2 hours per CSM per week.

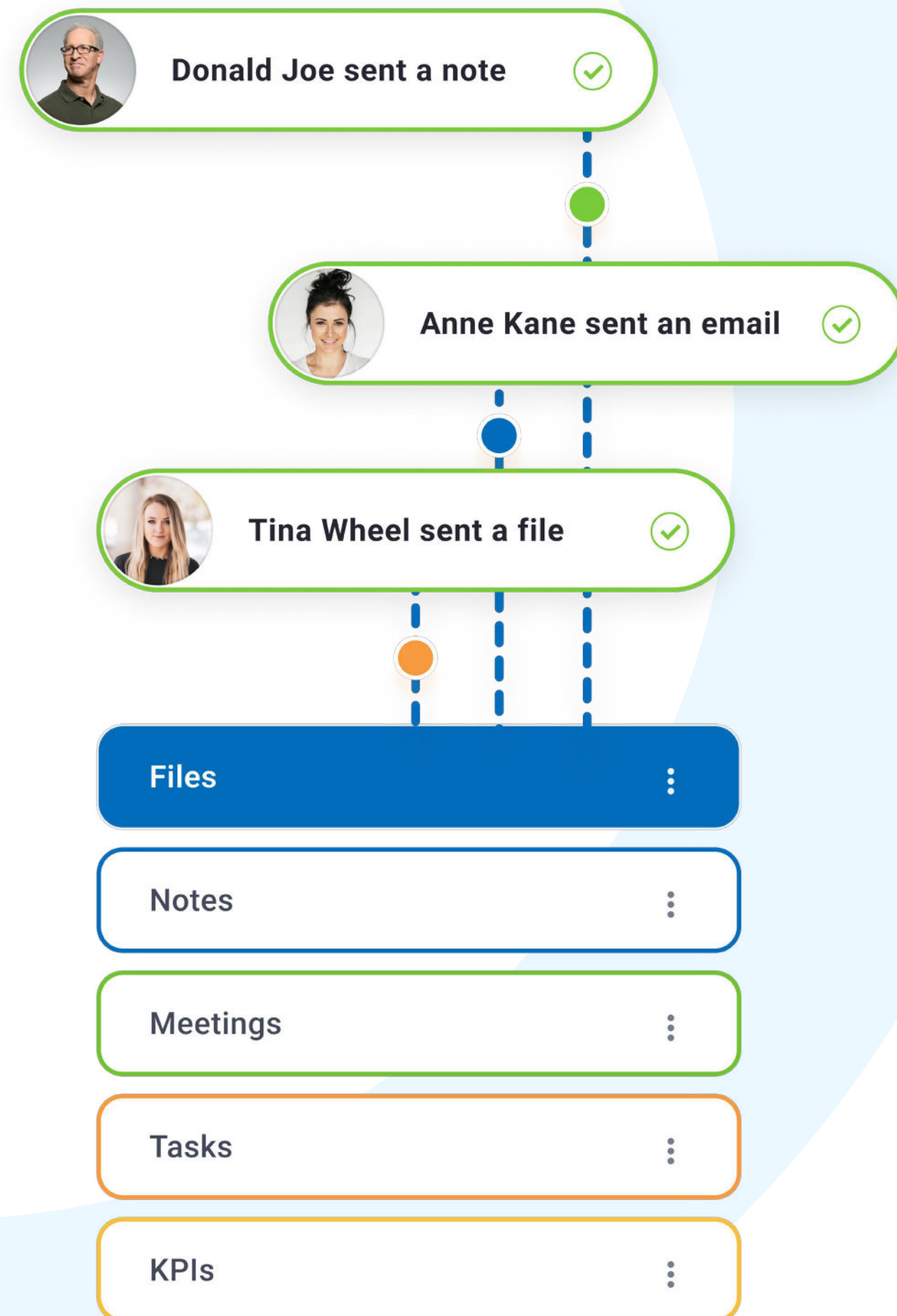
Quick Collaboration & Approval

Because everything can be stored centrally in a customer success platform, it gives you the option of adding a collaboration or approval workflow to your QBR processes.

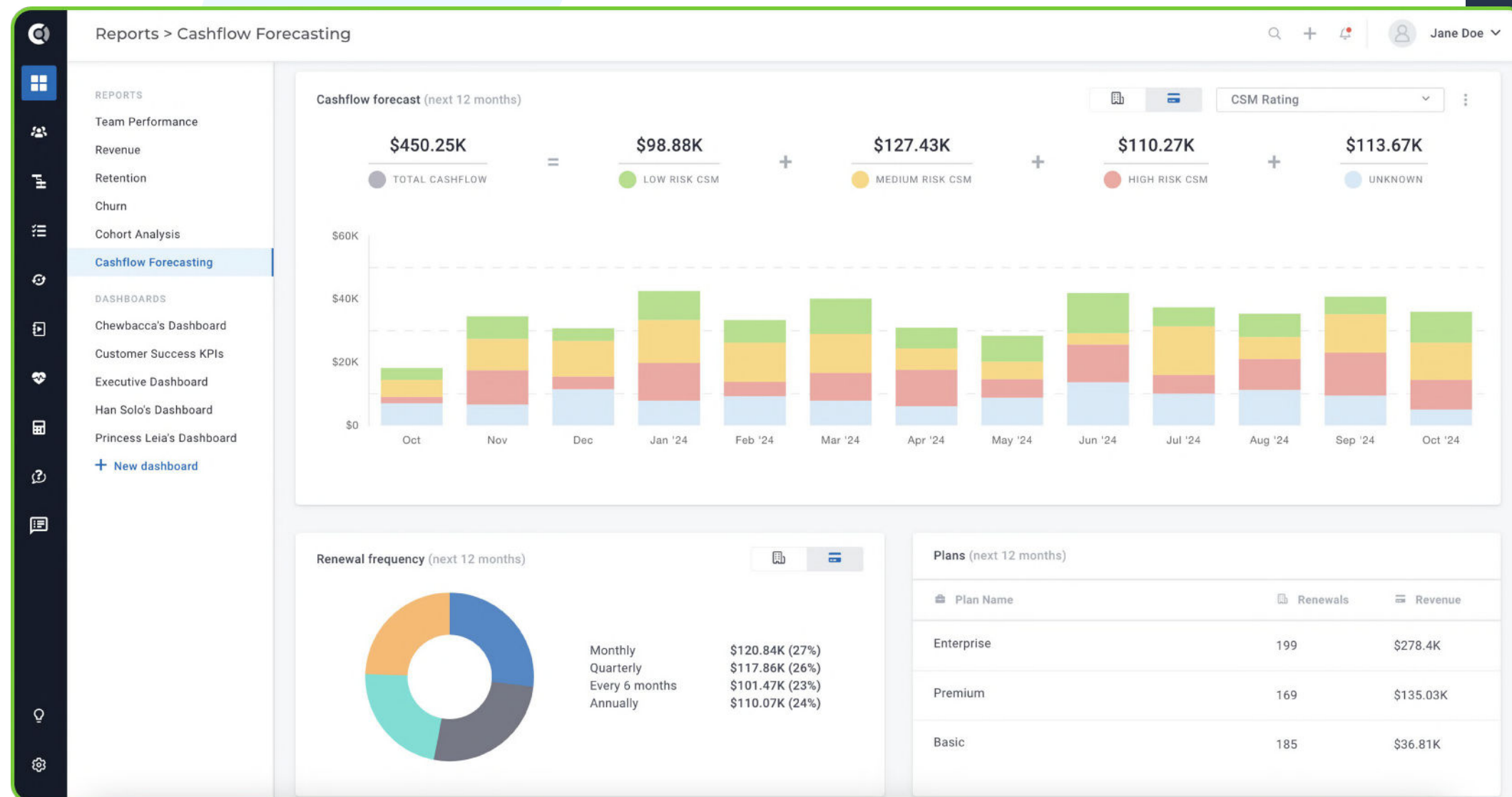
Whether you want to get the insights of an implementation manager who recently worked with the customer, or you want a senior CS team member to sign off on freshly prepared slide decks, CSPs can make this happen in just a few clicks.



Estimated time saved: 1 hour per CSM per week.



Actionable Insights & Next Steps



Because customer success platforms don't just give you a snapshot of the past - they can also predict future outcomes as well - they give you a powerful set of insights to help with your QBR planning.

By highlighting trends, identifying potential opportunities, and pinpointing potential risks, your CSP will help your CSMs feel better equipped to deal with more strategic conversations - ultimately adding more value to the experience for your customers.



Estimated time saved: 4 hours per CSM per week.

Summary Sheet

Your 'At a Glance' Guide to Streamlining Quarterly Business Reviews



Manual Process

- ✗ Manual data collection
- ✗ Developing decks from scratch
- ✗ Back and forth booking meetings
- ✗ Data silos & poor internal comms
- ✗ Data analysis & interpretation

Efficiency

- ✓ Automated Data Collection
- ✓ Pre-Built Templates
- ✓ Scheduling Assistants
- ✓ Quick Collaboration & Approval
- ✓ Actionable Insights & Next Steps

Time Saved

- 2-3 hours a week
- 7 hours a week
- 1-2 hours a week
- 1 hour a week
- 4 hours a week

Quarterly business reviews, or QBRs, are a vital part of the customer journey. However, they have a reputation among CSMs for being time-consuming and complicated to prepare for. On top of this, if not done properly, a low-quality QBR can create a negative experience for your customers, too.

We outlined some of the biggest issues your CSMs will face when preparing to deliver a QBR for a customer, including:

- ✓ Manual data collection from multiple sources
- ✓ Developing QBR slide decks from scratch every time
- ✓ Wasting time going back and forth to book meetings
- ✓ Navigating data silos and internal communication issues
- ✓ Sinking countless hours into data analysis and interpretation

To counteract these all-too-common issues with QBRs, businesses and CSMs should consider a customer success platform (CSP) to help streamline the entire process.

Conclusion





Philipp Wolf,
Founder & CEO - Custify



As CEO of a company in the CS industry, I've seen firsthand the transformative impact of integrating time-saving initiatives through a platform like Custify. We've identified four key strategies that can save CSMs over 17 hours a week, time that's far more valuable when spent directly engaging with customers.

These include automating data collection for a comprehensive customer view, utilizing smart slide templates for instant information access, leveraging scheduling tools for efficient QBR planning, and implementing streamlined approval workflows to minimize internal communication barriers.

For any organization looking to enhance their QBR processes, adopting a CS Platform is a game-changer.



Elevate your Quarterly Business Reviews and customer success strategy with Custify's comprehensive platform. Experience a revolution in managing QBRs, fostering product adoption, reducing churn, and unlocking upsell opportunities.

Custify empowers your customer success team to excel with advanced tools, enabling:

- ✓ **Efficient QBR Management:**
Simplify and enhance the effectiveness of your QBR processes.
- ✓ **Proactive Customer Oversight:**
Real-time management for consistent customer engagement.
- ✓ **Centralized Customer Data:**
Access all vital customer information in one unified hub.
- ✓ **Actionable Guidance:**
Clear, directed tasks for progressive customer journeys.
- ✓ **Instant Health Assessments:**
Quickly gauge and address customer health issues.
- ✓ **Strategic Predictive Analytics:**
Utilize forward-looking insights for informed decision-making.
- ✓ **Seamless Tool Integration:**
Integrate Custify effortlessly with your existing tech stack.

Streamline Your QBR Processes With Custify



Transform your approach to customer success with Custify, where efficiency meets innovation.

[Request a Demo](#)

FAQs

Q: What does the term 'quarterly business review' refer to in a customer journey?

A Quarterly Business Review (QBR) is a strategic meeting between a business and its customers to review performance over the past quarter, align on goals, and discuss future plans. It's main purpose is to foster strong partnerships and ensure ongoing customer success.

Q: Why are QBRs considered pivotal in a customer journey?

QBRs are pivotal because they ensure both parties are aligned on objectives and outcomes, allow for strategic planning, and help identify and resolve issues early. They strengthen relationships by demonstrating commitment and enabling collaborative growth opportunities.

Q: What common issues do CSMs have preparing for QBRs?

Customer Success Managers (CSMs) often struggle with preparing for QBRs due to time constraints, scheduling issues, difficulty in gathering relevant data, and internal communication problems... not to mention creating an engaging and insightful presentation for their customer.

Q: How can adopting technology, like a Customer Success Platform (CSP), streamline QBR preparation?

Adopting a Customer Success Platform (CSP) can help to streamline QBR preparation by automating data collection and analysis, providing real-time insights, enabling easier communication and scheduling, and assisting with the creation of high impact slide decks. This all helps to save your CSMs time and improve the value of QBRs for your customers.

