

The QBR Conversation Kit

Turn the quarterly readout into the strategy conversation your customer remembers

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Most QBRs are a vendor readout: 40 slides of usage stats the customer politely sits through. This kit converts the same meeting into a strategy conversation: 20% looking back, 80% looking forward, and every metric translated into an outcome an executive would repeat.

OPEN WITH A QUESTION, NOT A READOUT

Never open with: "We're here to walk through Q1 performance."

"I'm here to help you maximize your value. Before we dive in: what would you get the most value out of our time today? And what's changed since we last spoke?"

Two minutes of revalidating their priorities reshapes everything you present after it.

TRANSLATE EVERY METRIC INTO AN OUTCOME

METRIC (WHAT YOU HAVE)	OUTCOME FIRST (WHAT YOU SAY)
"500 active participants across 12 departments."	<i>"We delivered a 22% improvement in on-time delivery, supported by 500 active users across 12 departments."</i>
"Usage expanded to three more teams."	<i>"Expanding to three more teams cut your pilot-to-production timeline by 30%."</i>
"Conversion is at 28%, up from 21%."	<i>"Same pipeline volume, significantly more revenue: sales efficiency is up, and so is ROI on marketing spend."</i>
No hard outcome data? Make a labeled assumption.	<i>"Based on industry benchmarks, this typically translates to [outcome]. Does that ring true? Course-correct me, and I'll use your methodology going forward."</i>

THE PREP RULES

1. Send the deck 24-48 hours early with talking points: "Would love your take on slide 5."
2. Ten to 12 slides max; everything else is appendix. Exec version: 5 slides (snapshot, outcomes, what matters most, what we're seeing, what we do next).
3. Chart titles are headlines: "EMEA revenue up 34% on the new release," never "Quarterly Revenue."

THE ONE-LINE GUT CHECK

If you could only show 3 metrics, which would they be? Everything you can't answer "why would they care?" about goes to the appendix.

WHAT "DONE" LOOKS LIKE: THE 20/80 SPLIT

TIME	WHAT'S HAPPENING	READ
First 12 min	Current state: wins celebrated, ROI validated, course-corrections named.	20%
Remaning 48	Ideal state and action: their evolving priorities, your recommendations with a point of view, owners and dates on next steps.	80%

If the customer talked more than you did, it was a strategy session. That's the goal.