

● GROWTH TRAJECTORY



Architecting the QBR

A Strategic Playbook for Proactive
Customer Success and Account Expansion



ACCOUNT EXPANSION
READINESS

✓ TARGET ACHIEVED

Bridging the Gap in a Fast-Paced Market

QBRs foster the open communication required to keep objectives and expectations perfectly aligned as market dynamics rapidly shift.

Service Provider

Client

Data

Grounding all strategic discussions in concrete metrics.

Trust

Encouraging clients to share concerns and aspirations openly.

Transparency

Addressing challenges head-on.

Market & Needs Shifts

The Strategic Value Triad



Evaluate Health (Retrospective)

Systematically review KPIs, usage statistics, and support ticket resolution times to uncover hidden friction.



Reinforce Value (Present)

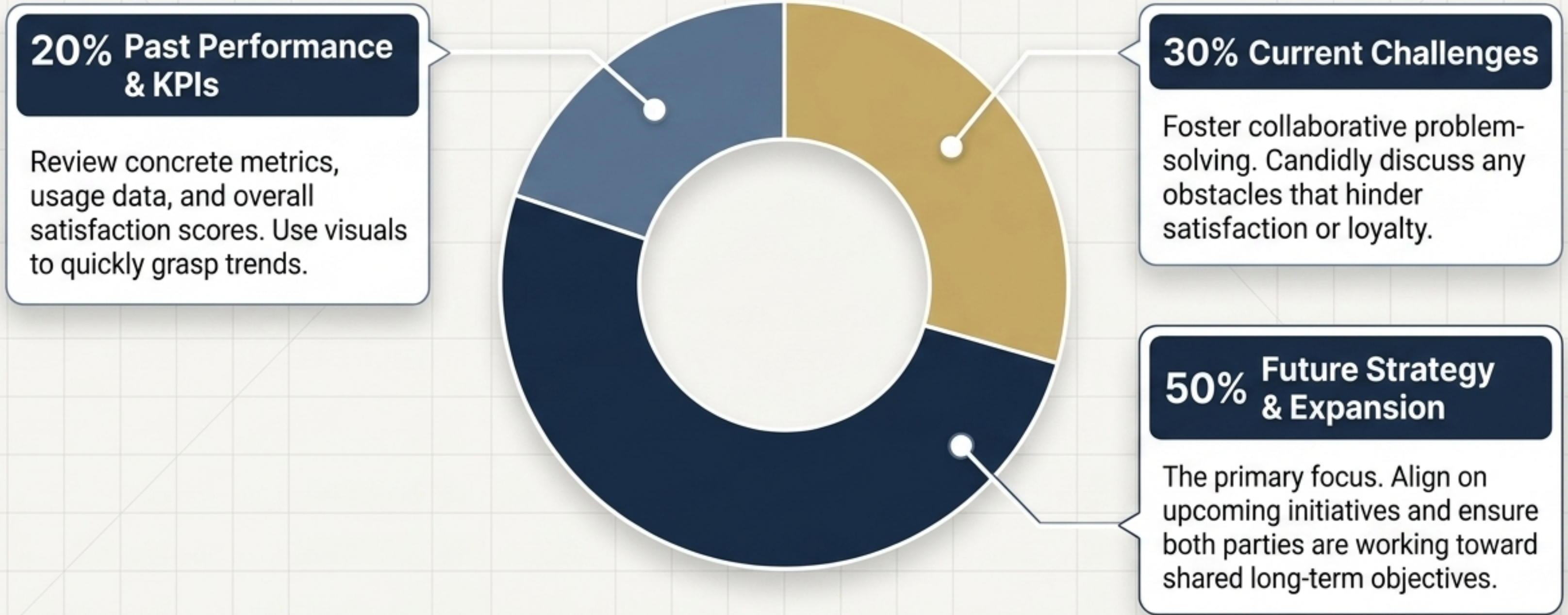
Showcase successes and positive operational impacts. Remind the client exactly why they chose this partnership.



Align Goals (Forward-Looking)

Capture shifting client aspirations and tailor solutions to meet their evolving business needs

Structuring the Conversation



The Execution Lifecycle

Phase 1: Pre-QBR (Gather & Align)

- ✓ Establish clear meeting objectives.
- ✓ Analyze KPIs and performance metrics.
- ✓ Solicit client input to tailor the agenda.

Phase 2: During QBR (Review & Strategize)

- ✓ Create a relaxed atmosphere to encourage open dialogue.
- ✓ Practice active listening to build trust.
- ✓ Empower all stakeholders to share feedback.

Phase 3: Post-QBR (Document & Execute)

- ✓ Document key takeaways and strategic pivots.
- ✓ Track execution of all action items.
- ✓ Follow up to reinforce accountability and commitment.

Driving Dual Business Outcomes

	Retention Engine	Expansion Engine
Strategic Focus	Proactive risk mitigation.	Opportunity capture and mutual growth.
Data Triggers	Expressed dissatisfaction, dropping feature usage, rising support tickets.	Goal achievement, high adoption, stated interest in new markets.
Action Protocol	Immediate intervention via product enhancements, additional training, or escalated support resources.	Deepen the relationship by offering tailored solutions, upselling, or introducing new product packages.

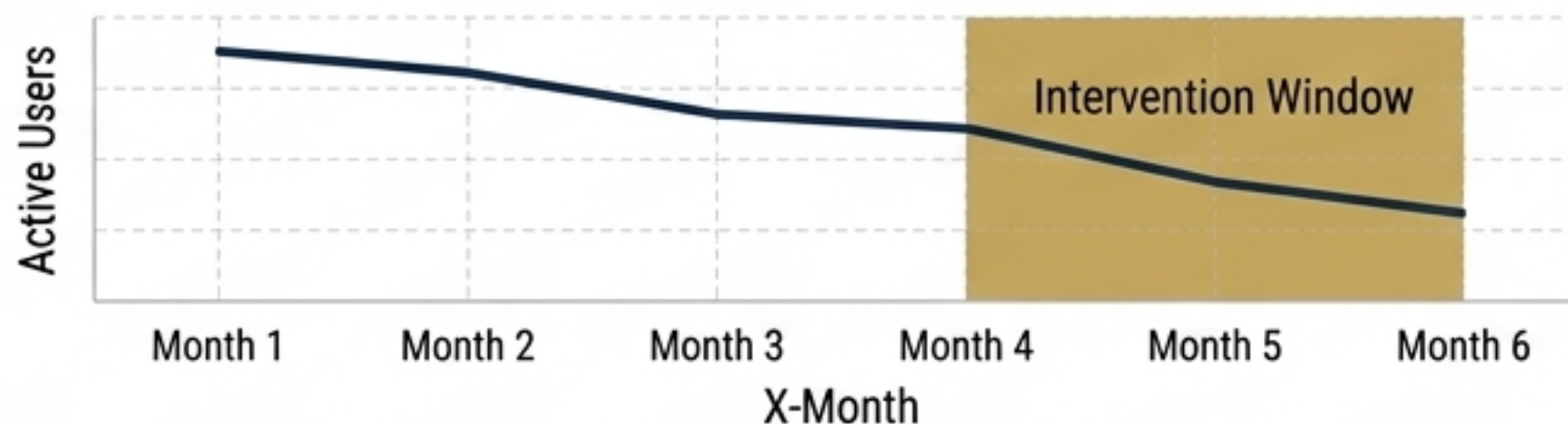
Grounding Strategy in Concrete Metrics

Core Principle: Effective QBRs abandon anecdotal evidence in favor of data-driven insights.

Identify Usage Patterns

Reveal exactly how effectively clients leverage the product to tailor specific user-experience recommendations.

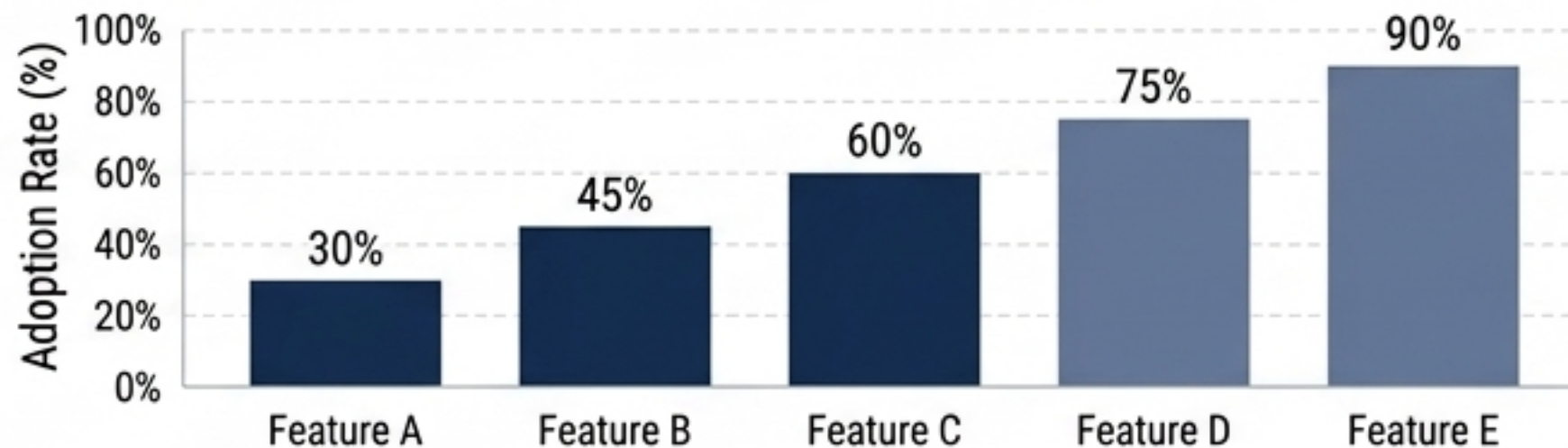
Usage Trend & Intervention Window



Forecast Interventions

Spot declining usage among client segments early, creating a window for proactive intervention rather than reactive damage control.

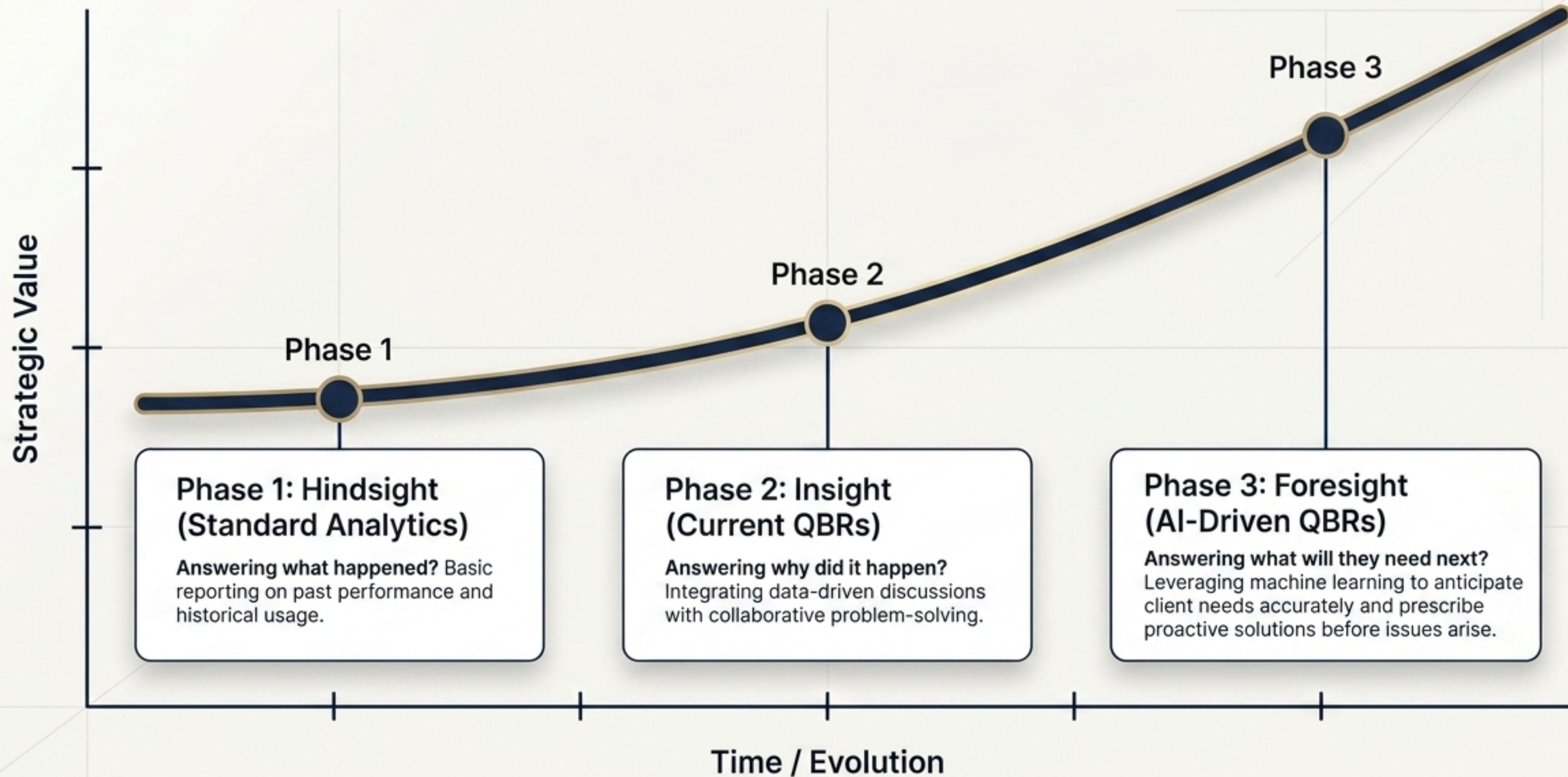
Feature Adoption Growth



Anticipating and Overcoming Roadblocks

Symptom	!	Intervention	✓
Absent Stakeholders Conflicting schedules lead to missed opportunities for critical collaboration.	!	Prioritize advanced scheduling and utilize flexible virtual meeting formats to accommodate distributed teams.	✓
Misaligned Expectations Clients arrive with specific concerns that differ entirely from the service provider's prepared agenda.	!	Establish rigorous pre-meeting communication. Solicit client input early to ensure both parties agree on desired outcomes before the meeting begins.	✓

The Future of Customer Success



The Continuous Loyalty Loop

Node 1: Capture Feedback

Actively seek input and concrete data during the QBR to understand exact needs and preferences.



Node 3: Drive Loyalty

Strengthened relationships lead to favorable contract renewals, transforming the service provider from a mere vendor into a strategic partner.

Node 2: Enhance Experience

Rapidly incorporate insights into product improvements and tailored service solutions.