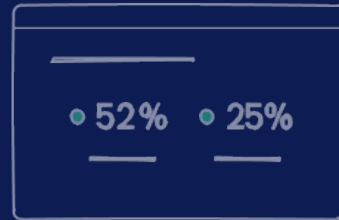




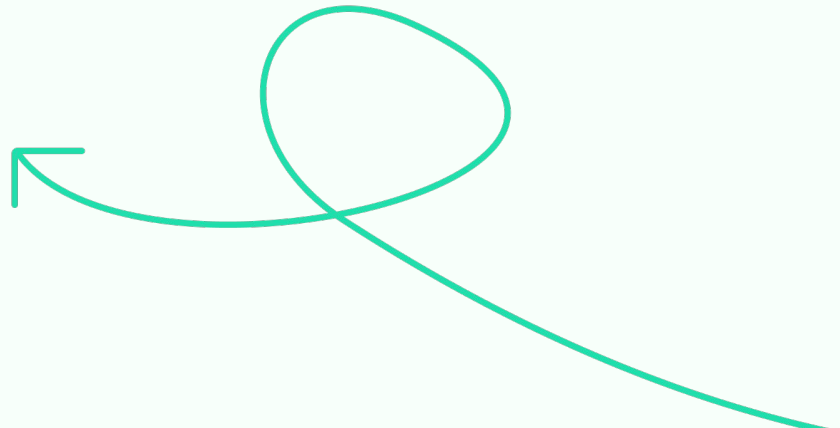
The Essential QBR Template



Overview

This template walks through the key components of a quarterly business review (QBR), and includes example slides of what this would look like for a fictional company called SimpleTicket. This fictional company is a platform that helps customer success teams handle inbound service requests from customers.

Use this data-driven QBR template to improve your existing QBR or start one from scratch.



Agenda

01 Topic 1

02 Topic 2

03 Topic 3

04 Topic 4

05 Topic 5

Goal: Give your customer a high-level overview of what you will be covering so they know what to expect.

Notes: This is a good way to double check that the flow of your deck makes sense and that you are telling a cohesive story. Even if you think your customer knows the basics, like how many licenses they purchased, it's always a good idea to remind them and progressively build the story.

Agenda

- **SimpleTicket Team Introductions**
- **Executive Summary**
- **Account Overview**
- **Usage Overview**
- **ROI Key Takeaways**
- **Industry Comparisons**
- **Recommendations**



Team Introductions



Name

[Role]

[Contact details]



Name

[Role]

[Contact details]

Goal: Remind the client who they're working with on your team.

Notes: While this may feel redundant, this is an opportunity to remind the client of all the resources available to them. If there are any new contacts on your side or theirs, this is an opportunity to officially introduce them and start building a relationship.

Our Team



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Executive Summary

Provide a high-level overview of the impact that your customer is seeing with the product. You might include metrics around:

- User adoption
- Product usage
- ROI



Goal: Give the customer a taste of what is to come.

Notes: It might feel like you're giving away the presentation, but it's important to share this first to align expectations. This slide will set the tone for the rest of the meeting, so make sure you're putting your best foot forward while at the same time being realistic about the account's status.

Executive Summary

107

Your team has successfully received **200 tickets** from **179 customers**. The average resolution time has been **2 hours**.

107

So far, we have had **388 total end users activated**, and an estimated **88% of them** have used the platform to handle a request.

107

The total realized time savings has been more than **30 hours per month per user**. We recommend a larger deployment to leverage this value across your organization.

200

Tickets created

The team has received 200 tickets since SimpleTicket was implemented.

57

Active users

Nearly the entire team is active in the software, which has resulted in major savings.

2k

Minutes saved per CSM

On averages, each CSM is saving 2,000 minutes per month by using SimpleTicket.



Account Overview

Use this slide to to share metrics related to the account and its users. Highlight metrics such as:

- Number of seats purchased
- Number of seats deployed
- Weekly active users

Goal: Remind the customer what they signed up for and what is happening at the user level.

Notes: Make sure to keep the information high-level and not get too into the weeds. While you want to remind the customer of what they signed up for, you don't want to include every single line item.



Overview of Deployment

Your team has been getting a lot of use out of SimpleTicket. Your team has purchased 60 licenses, onboarded 40 users, and has 20 weekly active users. With more usage, your team could see an increase in time savings and tickets solved.



60 purchased licenses

Your team currently has a total of 60 licenses that have already been purchased.



40 users onboarded

5% of provisioned users have gone through the onboarding process.



20 weekly active users

50% of users are using the app on a weekly basis.



Usage Overview

Highlight product usage on this slide. Rather than just throwing a bunch of numbers on a slide, share a data visualization, preferably a chart. Make sure to highlight key takeaways next to the chart. Don't try to jam all the metrics into one slide — instead, spread them across multiple slides as needed.



Donut Chart



Bar Chart

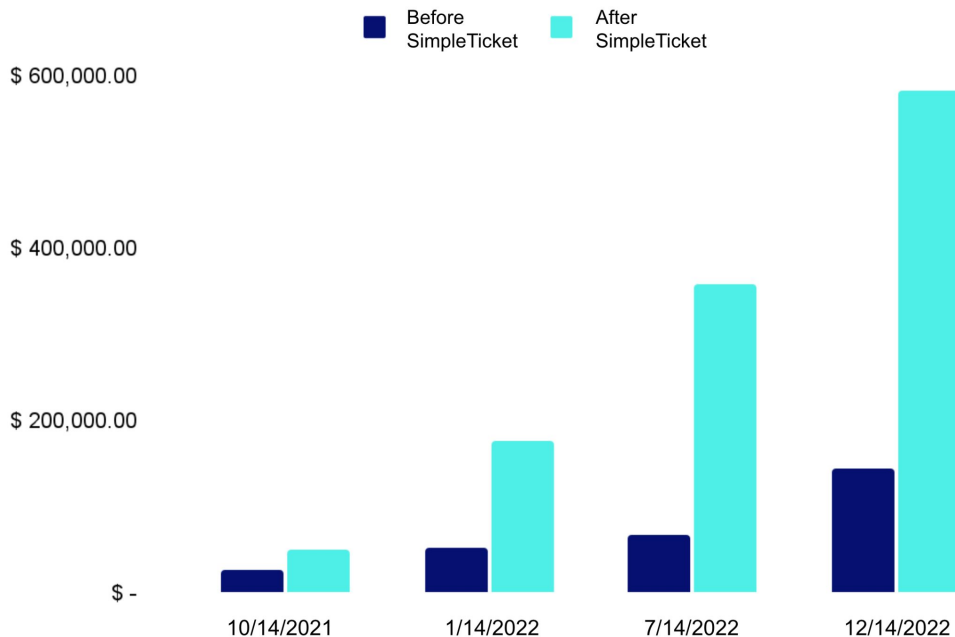


Dual axis chart
(line plus bar)

Goal: Help the customer understand their current usage.

Notes: Now that you've set up what the customer signed up for, it's now time to dive deep into how much their team is using the product. Share details even if the numbers aren't favorable—this is your opportunity to have a frank conversation about how to get your customer using the product more and work through what might be hindering them.

Total Number of Tickets Solved: 90



90

Tickets solved

Across the 3 active users, 90 tickets were solved in 2022.

7%

More tickets solved

There was a total of 80 tickets solved last quarter.

Jim

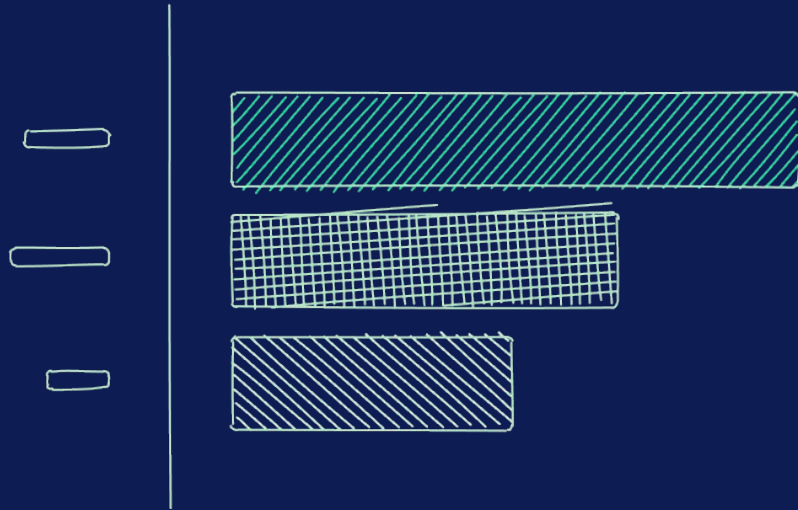
Most active user in 2022

Jim was the most active SimpleTicket user, and he solved 20% of all tickets.



ROI Slide

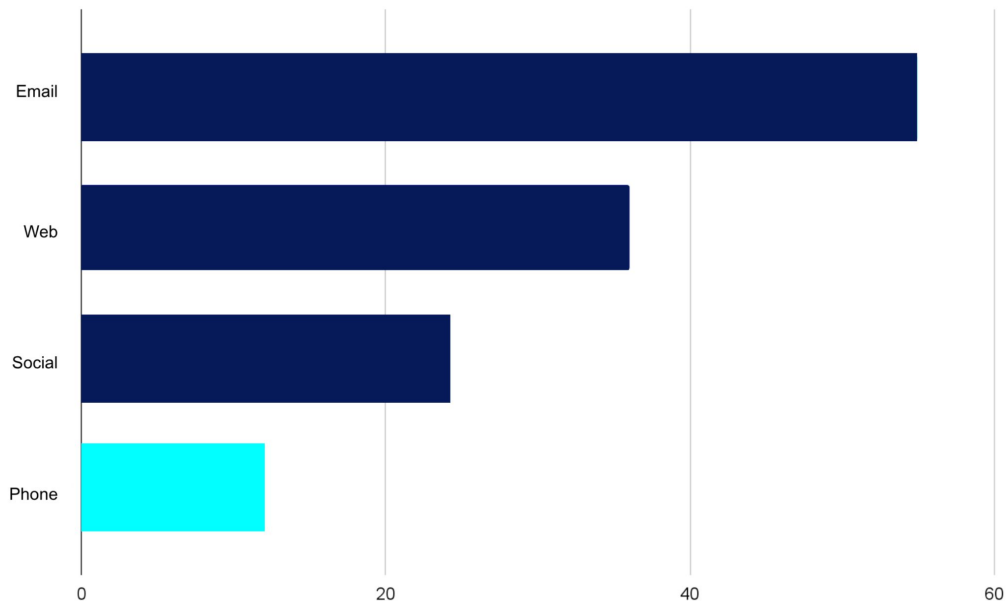
Highlight key ROI metrics to showcase your product's value. Metrics might include time savings, money saved, and/or revenue impact.



Goal: Quantify your product's value to the customer.

Notes: This is one of the most important slides in the QBR. You need to showcase the value the product has brought to your customer, and you need to support it with numbers. It's not enough to say that usage is high, you need to connect it to the objectives the customer is looking to accomplish.

Quickest Resolution Time: Phone Channel



12 minutes

Per ticket

Your phone channel has the quickest resolution time of 12 minutes per ticket.

5 minutes

First reply time

First reply time takes about 5 minutes on average, which has been reduced by 2 minutes.

78%

User satisfaction score

The average satisfaction score has increased by 5 points.



Benchmark Slide

Compare the data from a previous slide to some sort of benchmark.

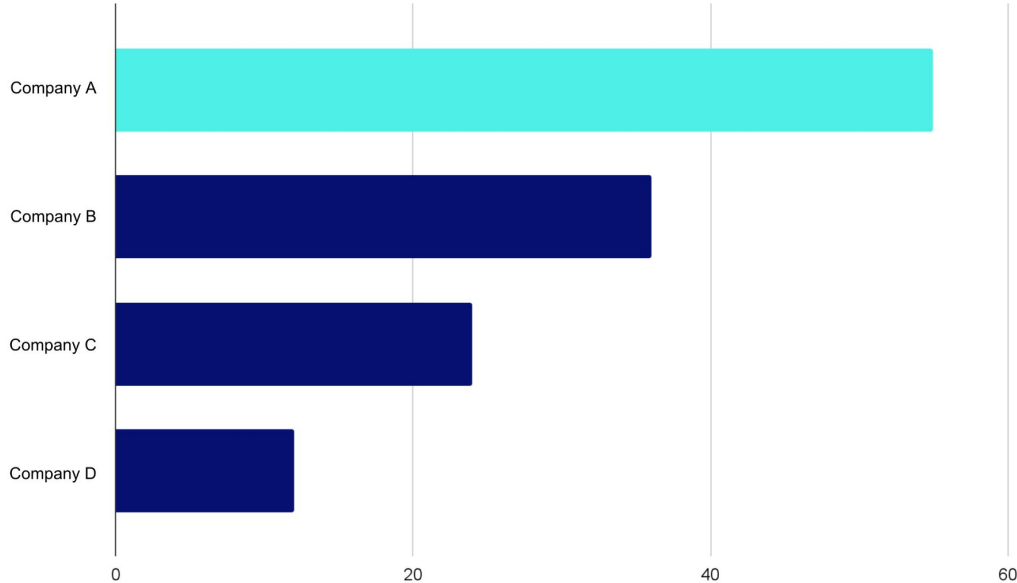
This could be a goal set with the customer, or a comparison with other similar companies.

When comparing with other companies, make sure you're leveraging a commonality like company size or industry.

Goal: Show customers the potential they can be unlocking with your product.

Notes: This is your opportunity to position yourself as a subject matter expert in the space. Have a conversation around what you're seeing with other customers, then make recommendations based off those insights. This positions you as a strategic advisor to your customers, which is invaluable.

Industry Comparisons



Your competitor

Your competitor has 15% higher adoption rate and has achieved 40% higher ROI with the product.

Other companies in your industry have seen an average of 85% user adoption rate and 288 hours saved each month.

We recommend internal training and incentives to gain more users and more value.



Recommendations

Share a few recommendations on how to improve user or feature adoption, so that the customer can get more out of your product.



Goal: Guide the customer to next steps and set adoption goals.

Notes: You want to make sure that you're setting your customer (and yourself) up for success in the future. Share ideas of how they can increase adoption, get more out of your product, and ultimately achieve their business goals.



Recommendations



Internal product training

Host monthly training sessions to get your team more comfortable with the product and using it more often.



Leverage resolution analytics features

Use reporting features to increase visibility into what's happening on the ground & help your team iterate quickly.



Collect and share team feedback

Do you have any suggestions for how the product can serve you and your team better? Let us know.



You aren't taking advantage of all features.



Groups

Add permissions on who has access to what features.



Alerts

Create alerts that notify key stakeholders of aging tickets.



Analytics

Better understand how efficient your support team is.



Templates

Use out of the box response templates for different scenarios.



CRM Integration

Sync up your support tickets to your preferred CRM.



Multi-channel

Resolve tickets from multiple channels - social, email, etc.





Automate presentations, documents, and reports directly from your data with AI.

50%

less data questions received by ops



190 hours

saved per week for analyst team



100%

adoption from global customer success team



12

business days to implement



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