

PREVIEW · QBR TEMPLATE

The 5-Slide QBR

Status meetings are theatre.

This is what a real quarterly review looks like.

WHAT THIS IS	A reusable QBR template: five slides, written commitments, executive present
FOR	Customer Success teams running mid-market and enterprise account reviews
DELIVERED IN	The Playbook Sprint
VERSION	Generic preview; tailored to your accounts on delivery

The full delivered template includes worked examples for three account segments, a facilitator's guide, and a follow-up email template. This preview shows the core five-slide structure.

HOW TO USE THIS TEMPLATE

Five slides. Sixty minutes. One written commitment.

Most QBRs fail because they're treated as status meetings: long decks, polite nods, no decisions. This template is built backwards from the only QBR outcome that matters: a written agreement, by both sides, on what changes between now and the next QBR.

The rules

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| 01 - Five slides, maximum | If your QBR is more than five slides, you're status-reporting, not reviewing. The discipline of fitting it into five forces clarity. |
| 02 - Executive present, on both sides | If neither side sends a decision-maker, the QBR isn't a business review. Reschedule rather than run it without. |
| 03 - No screen-sharing of the product | Save product walkthroughs for separate calls. The QBR is about commitments, not demos. |
| 04 - End with a written commitment | Both sides leave the call having agreed, in writing, what each will do before the next QBR. No commitments = no QBR was held. |
| 05 - Send the recap within 24 hours | If the commitments aren't in their inbox the next day, they're forgotten by the following week. |

SLIDE 01 OF 5

What you wanted from us 90 days ago.

We start where we left off. Not what we did. What you asked us to enable.

GOAL SET LAST QBR	STATUS	EVIDENCE
Get all 12 regional managers onto the platform	✓ DONE	12/12 active, avg. 4.2 logins/wk
Reduce monthly invoice reconciliation from 3 days to 1	✓ DONE	Now ~6 hours, finance team confirmed
Roll out the new compliance module to lettings team	PARTIAL	8 of 14 onboarded; blocker on integration
Hire and onboard new ops lead to own platform internally	NOT MET	Hire delayed to next quarter

Why this slide: Anchors the conversation in customer outcomes rather than vendor activity. Sets honest tone for slide 4.

SLIDE 02 OF 5

What you got.

Measurable outcomes in your terms. Not feature releases in ours.

IMPACT AREA	BEFORE	NOW	DELTA
Time spent on monthly reconciliation	3 days	6 hours	-83%
Platform adoption (regional managers)	0 of 12	12 of 12	Full rollout
Avg. monthly compliance audit time	11 hours	4 hours	-64%
Customer-reported errors per month	23	9	-61%

Why this slide: Quantified, customer-language outcomes. No mention of "users created" or "API calls." Speaks to the buyer's boss, who isn't on the call.

What didn't land, and why.

The slide most CSMs skip. The slide every founder remembers you for.

Compliance module rollout stalled at 8 of 14 users

Honest read: the integration with your existing audit log software took longer than we estimated. Our engineering team underestimated complexity by about 4 weeks. The remaining 6 users have a workaround in place but it's not the experience we promised.

What we're doing: a dedicated integration engineer assigned to your account for the next 30 days. Target full rollout by end of next month.

Ops lead hire delayed

This one's on you, your end. We flagged the risk in month 2 that without an internal owner, adoption would plateau. It has. Three of the 12 regional managers have stopped logging in regularly. Worth a candid conversation today on what the team can do to bridge the gap until the hire lands.

Why this slide: Honest accounting of what failed and why builds trust faster than any success metric. Owning your share and naming theirs reframes the relationship from vendor to partner.

SLIDE 04 OF 5

What we're changing.

Our commitments. Specific. With dates. Held against next quarter.

WHAT	WHY	WHEN
Dedicated integration engineer assigned to your account	Unblock the remaining 6 compliance module users	Next 30 days
Monthly account review with our VP Engineering	You wanted earlier visibility on roadmap blockers	Starting next month
New admin dashboard for your ops team (when hired)	Pre-empt the adoption dip we saw post-rollout	End of Q3
Quarterly executive sync with your CEO	She asked for less detail, more direction. Agreed.	Standing 30 mins, every QBR

Why this slide: Each commitment is one you can be measured against at the next QBR. "We'll keep improving" doesn't count. Names, dates, specifics.

SLIDE 05 OF 5

One ask of you.

Every QBR ends with one specific request. Not a list. One.

One thing we'd like you to commit to:

A named internal owner for the platform, in seat by end of next month.

Without an internal champion who owns adoption end-to-end, we'll keep seeing the dip we saw this quarter. We can build the best workflows in the world, but if no one on your side has it in their job description, it won't compound.

We're not asking you to hire someone new just for this. But we are asking that someone existing has it explicitly in their goals, not implicitly in their workload.

Why this slide: Mutual accountability. The customer is responsible for some of what makes the relationship succeed. Naming it directly (politely, specifically) turns a vendor relationship into a partnership.

FACILITATOR'S NOTES

How to actually run it

The slides are 30% of the work. The other 70% is preparation, facilitation, and follow-up. Skip these and the template doesn't save you.

Two weeks before	Send the customer a one-pager: "these are the four goals from last quarter. Where do you see us against each?" Get their view in writing before you build slide 1.
One week before	Pre-brief your own team. Anyone joining the QBR should know slide 3 (what didn't land) before they walk into the room. No surprises live.
Day of, 30 mins before	Re-read your notes from the last QBR. The customer remembers what you committed to. You should too.
During the call	Show the deck. Stop after each slide. Pause for reaction. The whole point is the conversation, not the slides themselves.
Within 24 hours	Send the recap. Slide 4 commitments and slide 5 ask, in writing, by email, with dates. CC their exec. Forward to your own team.
Two weeks after	Send a short check-in: "early progress on the four commitments, here's where we are." This separates QBRs that change things from QBRs that didn't.

DELIVERED IN THE FULL SPRINT

The complete Playbook Sprint includes this template plus: tailored versions for SMB, mid-market, and enterprise accounts; segment-specific worked examples drawn from your actual customer base; a recap email template; a facilitator's checklist; and a half-day training session for your CS team. Roll it out and your QBR completion rate roughly doubles inside a quarter, in our experience.

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