

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

**INTERNAL QBR'S TO  
SUPPORT REFLECTION,  
PLANNING AND ACTION  
TO DRIVE THE RIGHT  
OUTCOMES**

TUESDAY, NOVEMBER 15, 2022  
1PM EST/ 10AM PST



**KRISTI FALTORUSSO**

Chief Customer Officer  
ClientSuccess

brought to you by

client**success**

A CUSTOMER SUCCESS QBR IS AN  
INTERNAL REVIEW CONDUCTED ON A  
QUARTERLY BASIS TO PROVIDE CS  
PROFESSIONALS AN OPPORTUNITY TO  
REVIEW THEIR PERFORMANCE,  
LEARNINGS AND FUTURE PLANS WITH  
SENIOR LEADERSHIP.

# DESIGNING YOUR INTERNAL CS REVIEW

## DETERMINE YOUR CADENCE

Most teams find that quarterly reviews are most appropriate but other teams have opted for monthly.



2

## ATTENDEES

Who will benefit from participation?  
Do you want to include cross-functional team members?



4

1



## ALIGN ON THE DATA

What insights do you want the team to highlight about their business.  
Aside from retention and growth what data should be discussed.

3



## STRUCTURE

Do you want to make these sessions interactive? Leave time for Q&A? How long will each CSP have to present?

# BOOK OF BUSINESS



- Start with an overview of their book; this helps provide context for the rest of the discussion
- Determine what information is going to be most helpful - breakdown of segments, book health, revenue bands, sentiment renewal dates, lifecycle stage

# ENGAGEMENT INSIGHTS

## CUSTOMER MANAGEMENT

CUSTOMERS WITH NO PULSE  
UPDATED IN 30 DAYS

X / [TOTAL # OF  
CUSTOMERS]  
[X]%

CUSTOMERS SUCCESS  
SCORES BELOW 50

X / [TOTAL # OF  
CUSTOMERS]  
[X]%

CUSTOMERS WITH  
COMPLETED  
SCORECARD (100%)

X / [TOTAL # OF  
CUSTOMERS]  
[X]%

CUSTOMER  
ADVOCATES

X / [TOTAL # OF  
CUSTOMERS]  
[X]%

CUSTOMERS WITH NO  
ENGAGEMENT IN 30 DAYS

X / [TOTAL # OF  
CUSTOMERS]  
[X]%

CUSTOMERS WITH  
COMPLETED SUCCESS AUDIT

X / [TOTAL # OF  
CUSTOMERS]  
[X]%

CUSTOMERS IN ONBOARDING

X / [TOTAL # OF  
CUSTOMERS]  
[X]%

- Highlight what the current engagement and value realization is for the book of business
- How are you managing the right interactions with customers?
- How are you supporting customers through their journey?

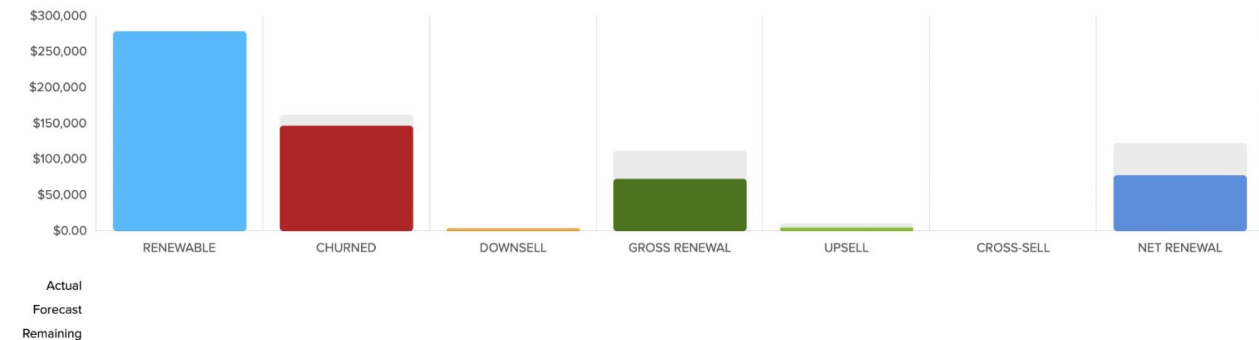
# RENEWAL PERFORMANCE

## Q4 2022 RENEWAL PERFORMANCE

# of Customers up for Renewal:

ARR up for Renewal:

Renewal Detail



- Start with revenue performance metrics - Even if your team doesn't manage revenue it's important to understand revenue influence

# RENEWAL PERFORMANCE DETAILS

## Q4 2022 RENEWAL PERFORMANCE

Client Name	Renewal Reason	Churn Reason	ARR

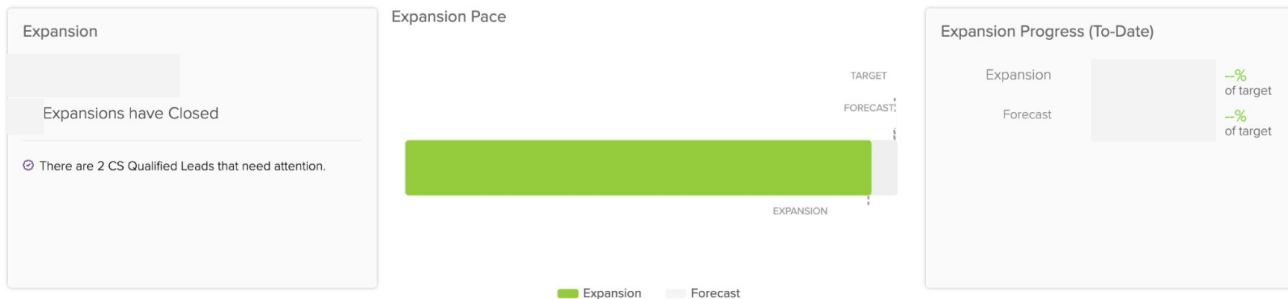
- Provide stories and additional context - it's not enough to discuss the numbers you have to be able to articulate themes of why customers stay and why they go

# EXPANSION PERFORMANCE

## Q4 2022 EXPANSION PERFORMANCE

# of Expansions Closed:

Expansion Revenue Closed:



Summary: [Include what attributed to the expansions/upsell closed. If any opps were closed lost, why did they slip? How were you able to influence the growth that was closed - 30 PI, demo, masterclass etc.]

- If growth is an area of focus, give the team an opportunity to share data around additional revenue
- Break down upsell, expansion and cross-sell to figure out where the revenue is coming from



# EXPANSION PERFORMANCE DETAILS

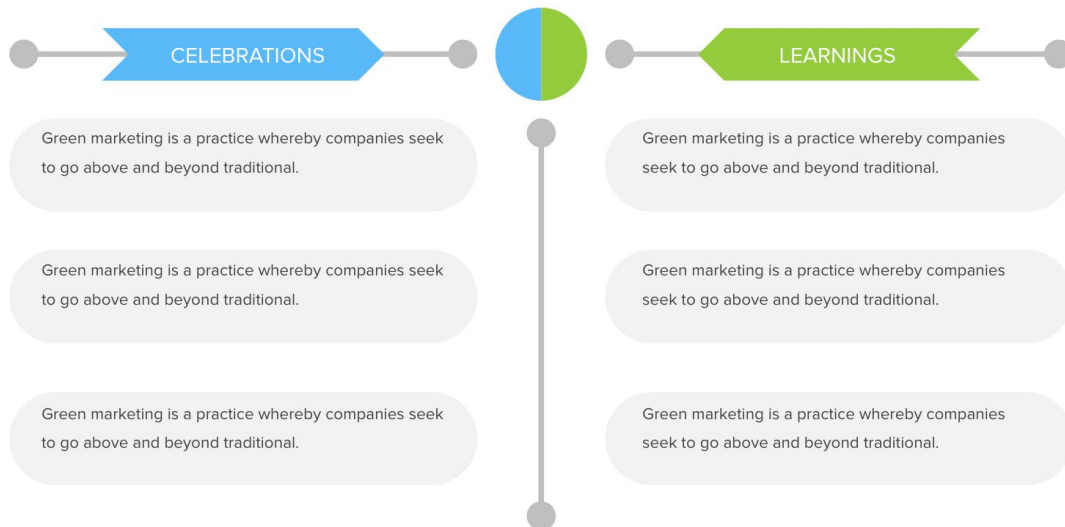
## Q4 2022 EXPANSIONS CLOSED

Client Name	EXPANSION DETAILS	ARR

- Similar to renewal stories, it's critical to take time to discuss where growth is coming from; storytelling is very impactful

# CELEBRATIONS AND LEARNINGS

## Q4 2022 CELEBRATIONS AND LEARNINGS



- Move away from the revenue to allow each team member to discuss their personal wins and their learnings
- Neither has to be tied to revenue - Stories highlighting progress with a customer or a strategy that worked across the portfolio

# FUTURE FORECAST

## Q1 2022 FORECAST

Client Name	ARR	TCV	Renewal Date	State	Renewed	Churned	Committed	Best Case	Pipeline	At Risk
	\$54,150.00	\$54,150.00	10-28-2022	Lost		\$54,150.00				
	\$28,500.00	\$26,740.75	10-31-2022	Lost		\$26,740.75				
	\$41,600.00	\$79,227.95	11-08-2022	Renewed	\$79,227.95					
	\$16,700.00	\$33,400.00	11-15-2022	Lost		\$33,400.00				
	\$19,200.00	\$17,950.00	11-30-2022	Forecasted				\$16,200.00		
	\$51,499.99	\$47,052.05	12-31-2022	Forecasted				\$47,052.05		
	\$27,700.00	\$27,700.00	12-31-2022	Forecasted				\$27,700.00		
	\$17,436.00	\$17,436.00	12-31-2022	Forecasted						\$17,436.00
	\$16,200.00	\$16,200.00	12-31-2022	Forecasted					\$16,200.00	
<b>Totals</b>					<b>\$79,227.95</b>	<b>\$114,290.75</b>	<b>\$0.00</b>	<b>\$90,952.05</b>	<b>\$16,200.00</b>	<b>\$17,436.00</b>

- Set time to talk about the immediate future; build a slide that allows them to forecast the period in front of them
- Allow them to ask for help and guidance from the team if they are navigating risk or objections

# FUTURE PLANNING

## LOOKING AHEAD: Q2 2022 PATH TO OPTIMAL RETENTION

Customers Up For Renewal Good

28

4

Average

18

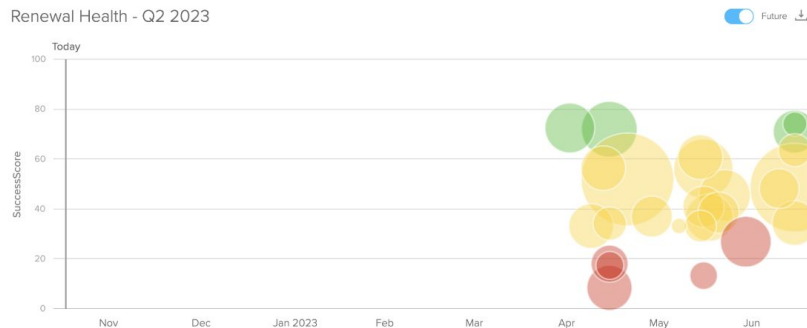
Poor

6

Overdue

3

Renewal Health - Q2 2023



- Here is an example of something I am going to do to ensure that we renew as much revenue as possible this quarter

- Here is an example of something I am going to do to ensure that we renew as much revenue as possible this quarter

- Here is an example of something I am going to do to ensure that we renew as much revenue as possible this quarter

- Look further out
- While you may not be able to forecast into several quarters out it is a good time to review so you are prepared for the future - and hopefully can influence it

# CUSTOMER HEALTH ANALYSIS

## CUSTOMER HEALTH

Customers with a Pulse

45/45

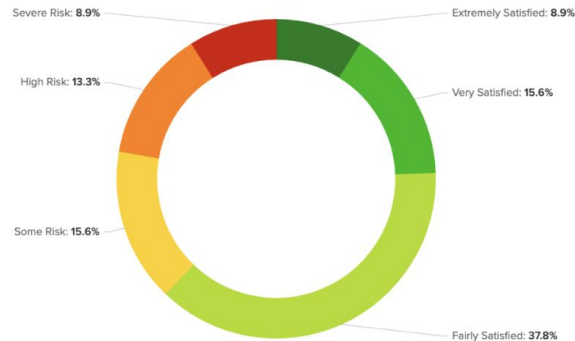
Pulse by ARR

\$1.19M

ARR cARR MRR cMRR Export



Satisfied	Risk	Not Set
62.2%	37.8%	0.0%
28	17	0
Customers	Customers	Customers



- Spend some time reviewing the health of their portfolio
- Dig into a few customers worth highlighting
- Find themes to discuss with the broader group

# ACCOUNT PLANS

## GET WELL PLAN FOR TOP 5 CUSTOMERS

CUSTOMER NAME	ARR	CURRENT PULSE	PLAN
CUSTOMER X	\$16,000.00	High Risk	Here are my plans to move this customer from high risk to some risk.

- Put plans together and share them - if you have customers at risk, this is an appropriate time to collaborate with the group and share your thoughts
- Great opportunity to drive collaboration

# GROWTH PLANS

## GROWTH PLANS FOR TOP 5 CUSTOMERS

CUSTOMER NAME	ARR	CURRENT PULSE	PLAN
CUSTOMER X	\$16,000.00	VERY SATISFIED	Plans to find growth opportunities in 5 accounts.

- Growth is critical to the success of your business; spend time talking about where there are growth opportunities and how you are going to capitalize on them

# PROFESSIONAL DEVELOPMENT

## PROFESSIONAL DEVELOPMENT

1.

Here are the things I plan to do this quarter to grow professionally.

2.

Here are the things I plan to do this quarter to grow professionally.

3.

Here are the things I plan to do this quarter to grow professionally.

- Introduce conversations around professional development as well
- Individuals need to own their own growth - give them a platform to share what they are doing to get there



# COMPANY FEEDBACK

## COMPANY RECOMMENDATIONS

1.

Here is an observation I've made around something we can improve as a team to show up better for our customers.

2.

Here is an observation I've made around something we can improve as a team to show up better for our customers.

3.

Here is an observation I've made around something we can improve as a team to show up better for our customers.

- Feedback is a gift; allow them to share their thoughts and observations for the business
- What do they think we can do differently for the team and customers?

# INTERNAL QBR MISTAKES TO AVOID

**1.**

**DON'T RUSH  
THE PROCESS**

**2.**

**DON'T KEEP  
THE  
DISCUSSION  
ISOLATED**

**3.**

**DON'T TRY TO  
GET IT  
PERFECT THE  
FIRST TIME  
AROUND**

**4.**

**DON'T  
PREVENT  
ACTIVE  
DIALOGUES**

**5.**

**DON'T  
REINVENT  
THE WHEEL - I  
BET YOUR  
SALES TEAM  
IS ALREADY  
DOING THIS**

THANK YOU