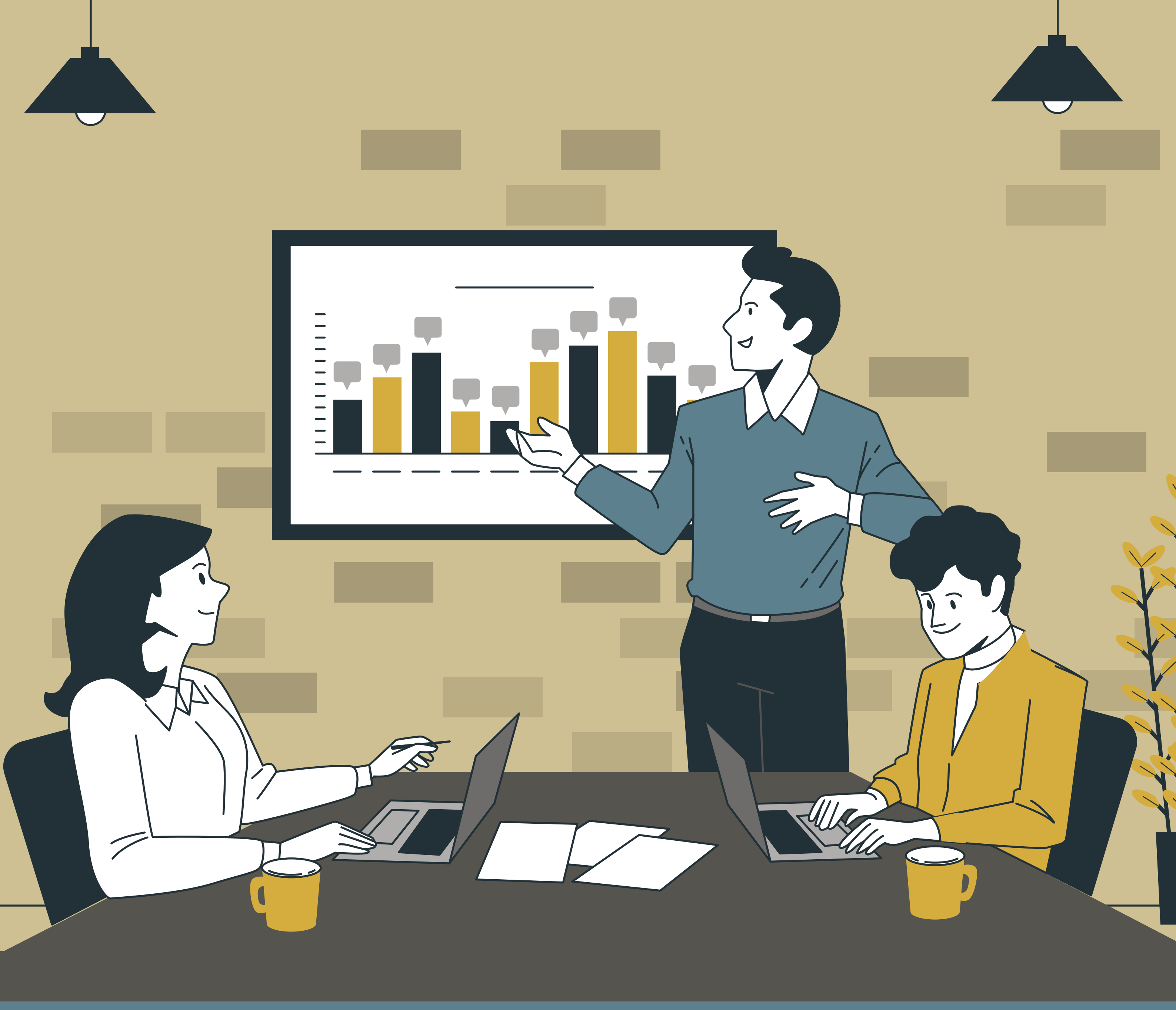

# Executive Business Review

## DO'S / DON'TS

### BEFORE

**DO'S**

1. Use modular approach - break down your EBR into meaningful and manageable segments.
2. Use a survey to find out what goals execs are after, and then touch those goals in the EBR.
3. Include client executives' goals in the EBR slide deck.
4. Ask your internal team to review the slides ahead of time.
5. Connect with your sales team to align on possible upsell opportunities.
6. Meet with other internal stakeholders to gauge their input for the EBR.
7. Prepare in advance for possible client pushback, feedback, or objections.

**DON'TS**

1. Don't forget to share the agenda with the attendees.
2. Don't prepare too many slides.
3. Don't create a completely new set of slides again and again (reuse, redesign, repurpose)
4. Don't make your EBR about your product.
5. Don't surprise your champion(s). Make sure you meet with them prior to review the agenda before the call.
6. Don't guess your client's priorities without confirming first.

### DURING

**DO'S**

1. Divide your agenda into two parts: strategic and tactical.
2. Showcase past successes.
3. Discuss what's hindering progress.
4. Allow time for your champion to present value and outcomes gained.

**DON'TS**

1. Don't waste your customer's time.
2. Avoid presenting poorly prepared content.
3. Avoid discussing topics or features your customer isn't concerned about.
4. Don't leave the meeting without discussing future goals.
5. Don't show up late.
6. Don't forget to leave enough time for Q&A.

### AFTER

**DO'S**

1. Show gratitude and thank the attendees for their time.
2. Send feedback form to all attendees. Capture what value they gained by attending the EBR, if any.
3. Ask internal attendees for feedback on how you handled the EBR.
5. Update your client's success plan based on the EBR.
6. Schedule a follow up call your client's champion to review the suggested success plan.

**DON'TS**

1. Don't forget to thank your attendees for their time; as soon as the meeting is over.
2. Don't forget to send your meeting notes to all the attendees, and the action items within 24 hours.
3. Avoid ambiguous action items. Specify owners and due dates.
4. Don't assume you got it right. Ask the attendees to review and validate your action plan.
5. Don't be shy about asking for help to get your success plan done.

This infographic was based on a CSM Practice podcast episode conducted with
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