

# QUARTERLY BUSINESS REVIEW

## CHEAT SHEET



**Know who the attendees are**



**Prepare your materials in advance**



**Set a clear agenda**



**Encourage attendees to participate**



**Develop a contingency plan**



**Create a visually engaging presentation**



**Focus on the Positives**



**Conduct a Recap of the Presentation**



**Have a Q&A Portion**



**Provide a copy of the presentation**



**Ask for Feedback**



**Schedule the next QBR**



**CSM PRACTICE**  
THE CUSTOMER SUCCESS STRATEGY CONSULTING FIRM