

THE DIFFERENCE BETWEEN

QBR

QUARTERLY BUSINESS REVIEW

VS

EBR

EXECUTIVE BUSINESS REVIEW

Focus on specific projects. Consider accomplishments, priorities, and outcomes alignment.



Focus on future outcomes. Consider possible opportunities for strategic partnership ahead, including long-term goals.

ACCOMPLISHMENTS

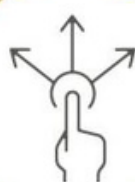
Showcase the product's short-term roadmap. Examine key product features based on specific project goals.



Provide an overview of the company's product roadmap and explain how it will integrate into overall market trends. Review the overall direction of the company.

ROADMAP

Identify the return on investment from purchasing the company's products and services.



Analyze market trends in depth from a technology, adoption, and Go-To-Market (GTM) lens.

STRATEGY

Determine any products / services / use cases that could address a specific customer / project need.



Determine future market and product opportunities that the company should be focused on.

BUSINESS NEEDS

Identify the latest project achievements. Determine the key metrics based on Customer use cases.



Establish the company's strategic and partnership vision. Find ways to align with others on opportunities, initiatives, and improvements.

CUSTOMER VALUE

Identify opportunities for your company while increasing value to customer. Describe the specific goals, expectations, and desired outcomes from applying your company products and services.



Identify opportunities for partnerships with the company, continue to add value to customer organization. Recognize their differentiation in the market or support their GTM strategy.

ALIGNMENT

To ensure success, classify any current problems that must be addressed, technical or otherwise.



Review key achievements and outcomes-based progress in the last quarter, as it relates to your customer's priorities.

PROGRESS



CSM PRACTICE
THE CUSTOMER SUCCESS STRATEGY CONSULTING FIRM