

CUSTOMER SUCCESS QBR MEETING PREPARATION CHECKLIST TEMPLATE

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	Collect data from the previous quarter to review with the customer, including updated SLA metrics, benchmarking data, and customer spend.
	Gather content, including images, marketing material, and updated copy, for your meeting presentation.
	Organize the presentation in order of importance of information to review, and plan to spend up to 30-40 percent of your allotted time in discussion.
	Develop an executive summary set of slides to use at the start of your deck in order to set expectations (what you will present, when you will address outstanding business, and when you will be open for discussion).
	Highlight valuable information in your slide deck with diagrams and images.
	Use active, direct language and avoid passive statements. Delete repetitive information.
	Format each slide with plenty of white space and minimize the use of text.
	Use bullet points and tables to summarize and highlight important data.
	Adopt the appropriate tone for the audience (for example, if you're presenting to executive leadership).
	Remove jargon, qualifying words (like "very"), technical terms, and unfamiliar company terminology and acronyms.
	Remove cliches, buzzwords, or unnecessary phrases like "best in class."
	Edit for brevity. Strive for one big idea or topic per slide. Highlight information you want the customer to remember.
	Include a summary slide to close the presentation and review the information and the desired outcome of the meeting.
	Don't worry about slide count — make your slides count. For paced presentations, plan for one or two slides per minute. For a faster paced, well-rehearsed presentation that covers a lot of information, plan for up to five slides per minute.

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