FIELD NOTES 04 / BUSINESS REVIEWS

Run a business review that ends with action

Structure QBRs and EBRs to validate value, surface concerns, and agree what happens next.

A business review tests the account team's understanding of progress, health, and priorities against the customer's view. A useful structure makes room for the customer to be heard while keeping decisions and actions visible. The review succeeds through clarity and follow-through, not the deck alone.

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THE CORE IDEA

Understand the customer → Put learning to work → Keep the next step clear

FIELD NOTES 04 / SECTION 01

01. Prepare before building the deck

Continuous discovery, value conversations, and proactive account work provide the substance of a business review. The deck brings that learning together.

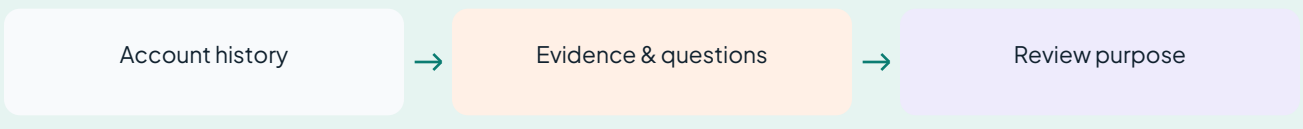
Review the account history and identify what still needs validation before creating the presentation. Tailor familiar discovery questions to the customer's industry, workflow, and current situation.

Preparation should distinguish confirmed progress from the account team's assumptions. A polished presentation cannot replace a current understanding of the customer.

- What is the customer trying to achieve?
- What has changed?
- What progress can be substantiated?
- What is preventing the next result?
- What needs to happen together?

> The review starts with the relationship record, not an empty slide deck.

FIELD PATTERN / 01



FIELD NOTES 04 / SECTION 02

02. Give people a reason to attend

Share the purpose and agenda when proposing the meeting. “A business review” is a label; it does not explain why the customer should spend time on it.

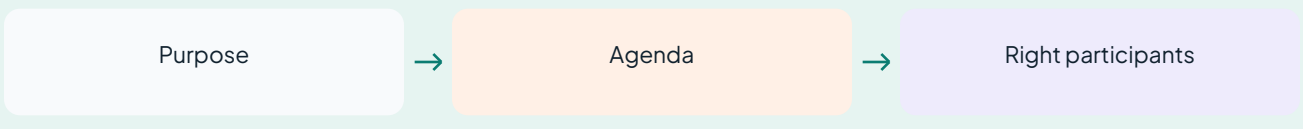
An operational QBR needs people who understand the work and can act on the discussion. An executive review needs people who can speak to business priorities and decisions. Explain which part of the conversation needs each perspective.

A senior stakeholder may not always be available. Make the reason for their involvement clear, and agree how their input will be gathered if they cannot attend.

- Confirm priorities and revisit the original goals.
- Review accomplishments and evidence of value.
- Discuss unresolved issues and improvement areas.
- Explore relevant capabilities or use cases.
- Check renewal confidence where appropriate and agree actions.
- Leave time for broader feedback and questions.

> The agenda should explain both the value of attending and whose input is needed.

FIELD PATTERN / 02



FIELD NOTES 04 / SECTION 03

03. Open by checking whether the context has changed

Allow enough time for the account and participants. A substantive review may need 45-60 minutes, but the agenda and decisions should determine the length.

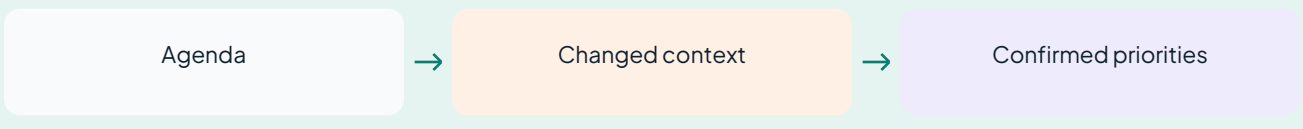
At the start, confirm the agenda and ask whether anything important changed since the meeting was arranged. A leadership change, initiative, or budget decision can alter the purpose of the discussion.

Revisit why the customer chose the platform and confirm whether those goals still apply. Adjust the meeting when new information makes the original framing outdated.

- Confirm the purpose and agenda.
- Ask what changed since the last conversation.
- Reconfirm the original objectives.
- Agree any necessary changes to the discussion.

> Check the current context before presenting a story about the past.

FIELD PATTERN / 03



FIELD NOTES 04 / SECTION 04

04. Validate accomplishments against the customer's goals

Connect the customer's intended result with what has actually happened. Put the most relevant measures near the beginning of the review.

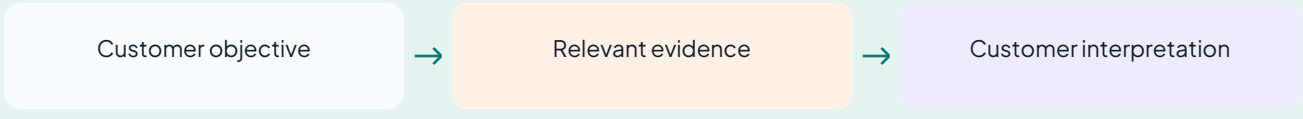
An account focused on call-return rates needs evidence about that objective. Another focused on marketing briefs needs evidence about that workflow. General activity figures may support the discussion, but they do not automatically establish impact.

After sharing the evidence, ask: "Does this reflect the team's experience? Is there anything that should be interpreted differently?" Affirmation, challenge, and disagreement all help clarify the account.

- An implementation milestone that enables further work.
- A workflow the team can now complete.
- A substantiated reduction in task effort.
- An improvement in an agreed operational measure.
- User feedback about a specific benefit.

> Present the evidence, then validate its meaning with the customer.

FIELD PATTERN / 04



FIELD NOTES 04 / SECTION 05

05. Address the gaps directly

Discuss areas where the experience has fallen short or progress remains incomplete. These may include recurring support issues, implementation delays, training needs, or a workflow that still does not work as expected.

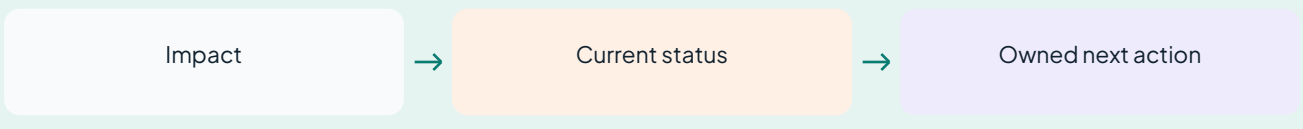
Explain the meaning behind the activity. Several tickets could reflect normal onboarding questions or a recurring problem; customer experience helps establish which.

Acknowledging a gap is not the same as resolving it. Make status, impact, and ownership clearer so the customer knows what happens next.

- What happened and how it affected the customer.
- What has already been done.
- What remains unresolved.
- Who owns the next action.
- When an update can be expected.

> A difficult issue becomes more manageable when its status and next owner are clear.

FIELD PATTERN / 05



FIELD NOTES 04 / SECTION 06

06. Connect the discussion to relevant possibilities

Follow the gaps discussion with a credible look ahead. A product update, an unexplored capability, or an appropriate customer example may be useful when it addresses a specific need.

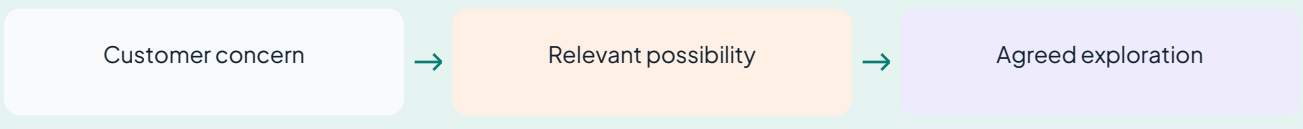
Explain the connection: “[Problem] is limiting the team. This capability may be relevant because [reason]. Would it be useful to explore the fit?”

Distinguish what is available today from what is planned. A future release should not be presented as a confirmed solution. If no update fits, offer a practical perspective using existing capabilities while keeping unresolved commitments visible.

- Start with a problem the customer has identified.
- Explain why the possibility is relevant.
- State availability accurately.
- Agree whether an evaluation is worth doing.

> A roadmap slide becomes useful only when its relevance is clear.

FIELD PATTERN / 06



FIELD NOTES 04 / SECTION 07

07. Ask the commercial question when the context supports it

A review can test renewal confidence after discussing progress, outstanding issues, and the forward plan. One possible prompt is: “Given the progress and the plans for the outstanding issues, if renewal were today, would the team choose to continue?”

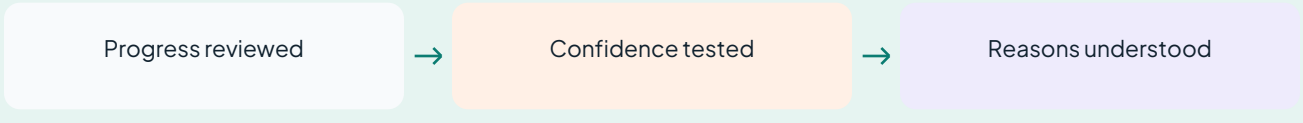
Use the question when the customer has enough experience to form a meaningful view. The right timing depends on implementation and the contract; a fixed month count does not fit every account.

Treat the answer as a pulse check, not a renewal commitment. Explore what supports confidence, what would need to change, and who else influences the decision.

- Is there enough experience to judge the value?
- What supports a positive answer?
- What explains hesitation or a negative answer?
- Which other stakeholders influence the decision?

> Test confidence rather than leaving with an unverified health assumption.

FIELD PATTERN / 07



FIELD NOTES 04 / SECTION 08

08. Agree next steps before the broader discussion

Protect time to confirm the core actions before a less structured discussion. Senior participants may have a hard stop, and a useful conversation can otherwise consume the time needed for decisions.

Next steps may involve training, technical follow-up, implementation work, another stakeholder, or an expansion evaluation. Make them specific enough for both teams to act.

This sequence is a practical default, not a reason to ignore urgent customer input. Material information can change the purpose of the meeting and the plan.

- What will happen next?
- Who is responsible?
- When will it happen?
- What input is needed from the other team?
- When will progress be reviewed?

> An action needs an owner and a time frame to become a usable commitment.

FIELD PATTERN / 08



FIELD NOTES 04 / SECTION 09

09. Invite feedback and check whether actions need to change

Invite customer input throughout the meeting, including after each substantive section. The final open discussion offers additional room for questions, workflow detail, and context that has not yet emerged.

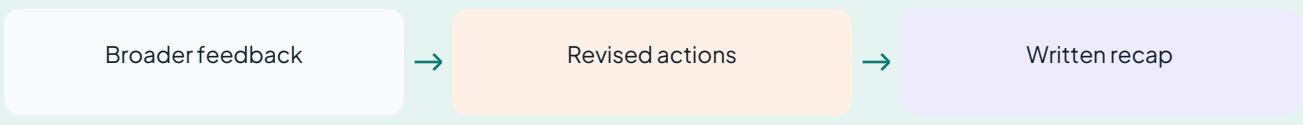
If a topic becomes a deep dive that would prevent the review from finishing, agree a follow-up. If it reveals a material issue, adapt the conversation.

Before closing, check whether the feedback changes any agreed actions. Then send a concise written recap of decisions, owners, dates, and outstanding questions. The plan remains responsive to what the customer has shared.

- Invite clarification and alternative interpretations.
- Make space for topics not yet covered.
- Route deep dives to an appropriate follow-up.
- Reconcile the action list with new information.
- Send the confirmed written recap.

> The actions discussed first are not fixed if later feedback changes the picture.

FIELD PATTERN / 09



FIELD NOTES 04 / SECTION 10

10. Use a checklist for the next review

A useful review clarifies whether the customer recognizes the value, which concerns need attention, and what each team has committed to do. Following through makes the meeting worthwhile.

- BEFORE: Confirm the purpose, share the agenda, and invite the right participants.
- BEFORE: Review goals, evidence, gaps, and past commitments.
- BEFORE: Separate current capabilities from future possibilities.
- DURING: Ask what changed and validate accomplishments against goals.
- DURING: Address gaps with clear status and ownership.
- DURING: Explore relevant possibilities and test renewal confidence where appropriate.
- DURING: Agree actions, owners, and dates; adjust them after feedback.
- AFTER: Send next steps, record uncertainty, and arrange promised follow-ups.
- AFTER: Update the account assessment using what was learned.

> Judge the review by what becomes clearer and what happens afterward.

FIELD PATTERN / 10

