

QBR Template

Attendees:

Name	Title	Department	Company

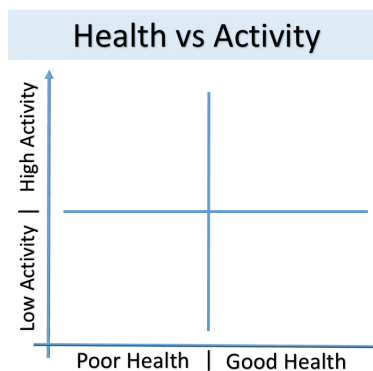
Complete, Outstanding, & New Items:

Completed Items Since Last QBR	Outstanding Items From Last QBR	New Items to Be Completed In the Next Quarter

Metrics: Which metrics are used to measure success? - (*Churn, Retention, Sales Qualified Leads, KPIs etc.*)

Metric	Value	Notes

Health Review:



Health Score	Activity Score

Conclusion	
Notes:	<p>Only ___ out of ___ accounts are highly active.</p> <p>Overall health is - Poor / Good / Very Good / Excellent</p>

Analysis of User Health:

Name	Title	Last Activity

Onboarding Tracker:

Activity	Adoption Rate	Users Who Have Completed Activity	Users Who Have Yet to Complete Activity

Ticket Tracker: No. of Tickets: _____

Date	Description	Category	Duration	Status

NPS Score Review: Average NPS Score _____

User	Company	NPS Score

Summarized Quarter Plan:

Time Period	Activity	Plan
30 days		
60 days		
90 days		

