

Quarterly Business Review Template

INTERNAL — Helix CS Operations (scanned doc)

PURPOSE

QBRs are scheduled meetings (typically 60 minutes) with strategic customers to review progress, surface issues, and plan ahead. They are required for accounts >\$25K ARR and recommended for all Enterprise accounts.

PREP

QBR prep takes 4-6 hours. Start at least one week before the meeting. Pull: usage data, incident history, ticket history, NPS responses, integration adoption, role-by-role usage breakdown.

STANDARD AGENDA

(1) Welcome and introductions (5 min). (2) Customer's business context — what's changed for them? (10 min). (3) Helix usage review — workflow count, run volume, integrations, top users (15 min). (4) Wins and challenges (10 min). (5) Roadmap and what's coming next (10 min). (6) Discussion of expansion opportunities (10 min).

WHAT MAKES A GREAT QBR

Specific data, not generalities. The customer's voice, not yours, dominating. Genuine acknowledgment of issues. Forward-looking commitment, not just retrospective.

FOLLOW-UP

Within 48 hours: (1) Send the deck and meeting recap. (2) File any action items in the customer's account record. (3) Update the renewal forecast based on what you learned.

EXPANSION SIGNALS

QBRs are excellent expansion conversations when handled well. Look for: usage approaching plan limits, mention of teams not yet using Helix, requests for features that exist on a higher plan.

HEALTH SCORE UPDATE

Update the customer's health score based on QBR signals. Major positive signals: champion engaged, expansion conversation, advocacy. Major negative signals: missed meetings, dissatisfaction with support, mention of evaluating alternatives.