

Business Review Canvas

The Business Review Canvas is a tool designed for Account Managers and Customer Success Managers. It facilitates the structure of a successful Business Review – be it Quarterly (QBR), monthly, or weekly.

Do you want to reduce your churn and increase your up- and cross-selling? Then learn more about our Customer Success programs at saas-collective.com.

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1. Set the stage

Introduction

Especially pay extra attention to the new faces on the table.

Preparation

Ask your customer if they agree with the agenda and if they think somebody else from the organisation should join the BR.

Agenda

Start your presentation with a short overview of the agenda so people know what to expect, can prepare and make the meeting more structured.

2. Review

What's the current status of your product. How do you score against the objectives of your client last quarter? What went well, where could we improve?

3. Utilization & user health

How is your customer currently using the product? What does it tell us about how successful users are in reaching their outcomes

Tip: a few quotes of happy users will make the presentation much more engaging!

4. Strategic goals & outcomes

Let the customer speak: where are they heading with their company? What keeps them awake at night? Are there any changes we should know about? What do they see happening in the market and how does that affect their strategy?

How can your product play a role in reaching the strategic objectives?

5. Goals for next Q

Clearly state the goals you want to meet by the time you have the next QBR. Take any learnings from last quarter into account in creating these plans.

Key decisions & action plan

Come up with clear action items (and owners).

7. Product roadmap

This is the time to tell them a little bit about what your company is doing and the roadmap of the product their using (specifically also outline which features could be beneficial for them).

6. Show value

Always clearly state the end goal (outcomes) you are working towards and how your product helps them reach their outcomes..

Benchmark

If possible:

- Benchmark the current way of working against the old way of working
- (BONUS) Benchmark against other (similar) customer
- How does the ROI look like of your situation?

Takeaways

8. Risks

Think about the threats & risks which could intervene with your plans and endanger the relationship and value of your product.

9. Opportunities

Which expansion opportunities are available to your customer? Maybe they could get a lot of value out of a specific (new) module?

10. Insights & goals

What kind of insights did you get out of the QBR, which could help both the customer as your own organisation to further expand the relation and become more successful? Think about Organisational changes, Change of stakeholders or Trends (internal and external).

Process

Attendees

Keep in mind: this will also influence the agenda! In case a C-level person is involved: keep in mind when to do it (most c-levels are very busy and would not bother to attend every QBR) and also if you should involve your own C-level.

Agenda

Propose an agenda to the customer. Be flexible here: sometimes the customer wants to zoom in on a specific topic.

Frequency

QBR is a process. It's imperative that you keep in sync with your customers on a regular basis. Agree at the end of the onboarding on the frequency of QBR's and plan them in advance. Sometimes a customer needs more attention: feel free to alter the frequency in that case to stay on top of your customer.

Tooling

Make sure that you process the QBR in the necessary tooling/reports so you exactly know what has been agreed/planned at the next business review. With larger numbers of BR's it makes sense to standardize.



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Takeaways	8. Risks	9. Opportunities	10. Insights & goals

Process	Attendees	Agenda	Frequency	Tooling

