

# Think your customers are happy?

There could be something  
you're missing.

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**Quarterly Business Reviews** are critical to measuring and monitoring the health of each client relationship, and the quality of service you're providing. So why are they often performed so poorly?

By overhauling your approach to this vital activity, you can **minimise churn** and **maximise operational control**.

This e-Guide shows you how.



# Why your QBR *(probably)* isn't working and how it can damage your business

According to estimates, **68% of businesses that part ways with a supplier do so because they "don't feel listened to".<sup>1</sup>**

This prevents businesses from even knowing about, let alone addressing, vital issues or opportunities that affect their customers.

Why do so many B2B suppliers fail to engage with customers on a fundamental level? Often, it's because they fail to recognise the true potential of a seemingly commonplace, yet disproportionately powerful tool: the Quarterly Business Review (QBR).

Those who do invest time and resource to optimise their QBR approach can expect a step-change in their ability to understand how well their business serves all clients, while multiplying their options to enhance CX.

68%

of businesses that part ways with a supplier do so because they "don't feel listened to"

2%

Fewer than 2% of organisations have quick access to direct customer feedback

# Five ways your Quarterly Business Reviews may be failing you:

**1**

**Inconsistent, inadequate quality** delivered in a non-digital format

**2**

**Failure to collect clear, structured feedback** on the health of your client relationships

**3**

**Poor reach**, with few key stakeholders being influenced

**4**

**Slow reactivity** to customer needs and challenges

**5**

**No two-way communication** between your leadership team and customer stakeholders



Engaged and satisfied customers buy **50%** more frequently, spend **200%** more each year and are **five times** more likely to display brand loyalty.<sup>2</sup>”

- CLIENTSHARE SUPPLIER RELATIONSHIP MANAGEMENT SURVEY

# Use this *guide* to:



**Address any of the five issues above that apply to you.**



**Identify where and how your QBR process may be letting you down.**



**Implement simple changes to radically boost its effectiveness, and your customers' experience.**



**Discover powerful digital tools to help you optimise this vital but neglected tool.**

# The **Leadership** view: **visibility, consistency and control**

Robust Quarterly Business Reviews are vital for a wealth of business-critical reasons: QBRs demonstrate the **achievement of SLAs and KPIs**; they provide **immediate, actionable feedback** to help you improve customer satisfaction; they enable the **planning and management of actions** to optimise each customer relationship; and when done right, they impact the experience of **multiple stakeholders** within your client's business.

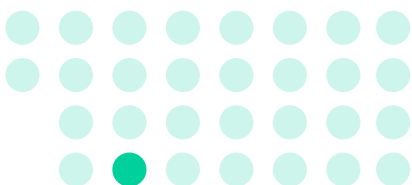
## But...

**there lies the problem. Relatively few organisations do carry out QBRs to optimum effect, as these three telling statistics show...**



On average, **supplier organisations only run regular reviews with 34% of clients.** The best performers, on the other hand, do so with **75% of clients.**<sup>1</sup>

Meanwhile, Gartner estimates that on average, companies who perform QBRs only succeed in influencing **1.7 of a client's key stakeholders per review.** Contrast this with the best performers, **who reach an average of 7.**<sup>3</sup>



Perhaps most worrying of all is the fact that **only 1 in 30 suppliers actually ask customers for feedback** during a review.<sup>1</sup>

# Creating a **powerful,** consistent and verifiable QBR process

The more direct insight and oversight executives have of each client relationship, the greater your strategic control and ability to manage risk, while nurturing and retaining client relationships.

## With the right approach, you can:

Create and embed a dynamic best-practice QBR process that **ensures all account managers carry out QBRs on schedule**, to an agreed standard that meets the needs of you and the customer. The result? Reliable performance data **at both client and aggregate level**, along with a more **consistent QBR experience for clients**.

Harness transformative digital tools and processes that **automate vital elements of the QBR process**, increasing its efficiency, transparency and accountability, as well as executives' ability to respond to findings. Right now, fewer than 10% of companies utilise digital workflow tools to create a consistent format and customer experience.<sup>1</sup>

**Make QBR results (scores, ratings and qualitative feedback)** available in a timely manner to all relevant colleagues, from account teams to your executive team.

Even if a QBR is performed by the AM alone, a robust QBR framework will **reflect and reinforce the customer's relationship with your wider organisation** – for example by giving senior executives a virtual presence at the meeting (see Section 4). This also allows additional opportunities to be covered (like the showcasing of new innovation) without placing that burden on the account manager.



82% of buyers express **frustration at a having no comms from supplier leadership** unless at renewal or when there was an issue.<sup>1</sup>

# Your people's perspective: *empowering* account managers with better QBRs

Account managers can face a barrage of demands. Often time-poor, they may feel compelled to focus their attention on “high opportunity” or “high-maintenance” clients at the expense of the majority of middle-ground clients, who may grow quietly resentful of the perceived neglect.

Account managers frequently feel they lack the tools, opportunity and objective data to truly prove their worth – both to clients and their own leaders. They can feel exposed, especially if receiving client feedback on metrics over which they have no control (such as service innovation).

**With the right QBR process and culture, these issues can be addressed.**



# An **optimised QBR approach** helps AMs demonstrate their value (to the client and to you), so they can shine in their role.

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The right model will provide your client with detailed, empirical evidence of how and where you're adding value, and allow them to share it easily with colleagues and superiors:



Enables digital tracking and logging of **completed actions**.



Facilitates easy, digitised **ratings of supplier performance** according to agreed, customisable metrics (e.g. quality of service, value for money, innovation etc).



Creates **tailored information for multiple audiences** within your organisation and your customer's (e.g. finance, procurement, board members, marketing).

## Key metrics

SLAs, KPIs etc

## Cost savings

fully tracked  
and evidenced

## Sustainability

whichever ESG metrics  
are most important to  
your client

## Giving AMs easier access to support when needed.

A robust QBR process allows AMs to provide empirical evidence when areas outside of their control need attention (e.g. if the client gives a low score for innovation), so the wider organisation can take action.

## Broadening the conversation between your businesses

By leveraging the right technology, the QBR model gives your senior execs a greater presence in the review process (see section 2), without being time-intensive. This also facilitates contact with senior leaders on the client side, which AMs might struggle to do, while allowing service innovations to be introduced and sold in.

## Creating a coherent history of the customer relationship:

Handovers to new AMs become easier and more seamless, since details of the supplier-client relationship are recorded in successive QBR outputs.



Fewer than **1 in 20** leaders have a two-way channel of communication with their key customer stakeholders.<sup>2</sup>

- CLIENTSHARE SUPPLIER  
RELATIONSHIP MANAGEMENT SURVEY

# Where do you go from here?

**Finding a sophisticated,  
practical solution to  
transform your QBR game.**

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In **client relationships**, as in countless other areas of business, **digital innovation** is enabling a step-change in best-practice, with a tangible impact on customer experience.

But while many of these solutions focus on streamlining a **part** of the process (such as managing customer surveys or NPS scores) there is **only one digital solution that impacts all aspects of a client relationship** in a dynamic and holistic way, while rooting its approach in the delivery of that pivotal element: the ultimate **QBR**.

# CLIENT RELATIONSHIPS. FIXED.

Taking QBRs to a *whole new level*  
with **Clientshare Pulse**.

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**Clientshare Pulse** is workflow tool that helps you carry out business reviews, gain feedback and measure the health of every client relationship. The result? Deeper trust, better management of risk and more opportunities to add value.

**Clientshare Pulse provides all the metrics you need to assess the health of any client relationship in seconds, with none of the unnecessary noise.**

# Simplification, innovation and control.

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## Clientshare Pulse **allows you to:**

**Deliver better client reviews with a simple, seamless workflow**

Schedule, customise and send reviews to all relevant stakeholders at each customer business, complete with personalised video messages and content for each recipient.

**Receive clear client feedback and scores**

Create key standard metrics for all customers while allowing individual clients to add their own, so that each QBR reflects their priorities and ensures they feel heard.

Give customers the ability to score you on a range of metrics that can be standardised across your business, enabling easy comparison and insight. Get notified when clients give you a low score or negative feedback.

**Provide insightful, actionable “health scorecards” for all your accounts**

Your Clientshare Pulse dashboard shows the health of each relationship and the performance of each account manager, enabling you to monitor both metrics “in the moment” and over time.



B2B buyers are behaving increasingly like consumers, showing a preference for frictionless self-service experiences.<sup>4</sup>

- ORACLE

# Learn more about Clientshare Pulse or arrange a demo.

[Learn more](#)

[Book demo](#)

**Dashboard**

Key indicators

- Number of licences: 190
- Number of reviews: 20
- NPS (Average across all accounts): 45
- Pulse Index (Average across all accounts): 3.9

Client name	Review sent	Review name	Recipients	Read	Pulse Index	NPS
Halvorson	End of Quarter Governance...		4	46%	4.7	+68
Shipyards Corp	Q4/2021 Business Review...		—	—	—	—
Acme Limited	Q4/2021 Business Review		10	100%	4.3	+52
Massive Dynamic	Q2/2021 BR		3	33%	4.0	+32
Target Systems	Nov 2020 Review with PE		7	70%	4.0	+32

Scorecards

- Pulse Index by Client
- Pulse Index by Account Manager

**Dashboard**

Client Scorecards

- Pulse Index (Line chart)
- Net Promoter Score (Line chart)
- Satisfaction Rating (Star chart)

Business Reviews

- Acme Limited Quarterly Business Review
- Acme Limited End of Quarter Governance Review
- Acme Limited Monthly Business Review

Actions

- Update client contact data
- Send sustainability report
- Send estimate for year end
- Share Job descriptions
- Send updated code of conduct...

**Amanda - please score us**

Scoring us really matters - it helps us learn and improve how we deliver services to you.

Service: How would you rate us for the service we provide? ★★★★☆

Value: How would you rate us for the value for money we offer? ★★★★☆

Relationship: How would you rate how well we manage the relationship? ★★★★☆

Reviews: How would you rate the effectiveness of our business reviews? ★★★★★

How likely is it you would recommend Hansen? ★★★★★

[Submit scores](#)

**Actions from review**

The following actions were agreed at the review meeting. You will receive an email with any actions assigned to you.

- Get contract approvals from designated stakeholders
- Get contract approvals from designated stakeholders



## Sources

<sup>1</sup> Customer Experience Report by Right Now

<sup>2</sup> Clientshare Supplier Relationship Management Survey

<sup>3</sup> C.E.B. / Gartner

<sup>4</sup> How to Make Sense of Guided Selling and CPQ (oracle.com)