Executive Business Review (EBR) template

Guess what? EBRs don't have to be a snoozefest of metrics and corporate jargon.

Done right, these executive touchpoints can take your customer relationships from "meh" to 11/10. Here's the tea: EBRs are like a progress report on your partnership's progress. It's a chance for both you and your client to check in on what's working (and what's not), then figure out how to level up.

This template brings the insights without the snore. We're talking quick hits on adoption, value gained, and satisfaction. No excel spreadsheet required. The goal? Make sure you and your customer are aligned on expectations, goals, and next steps. You want them feeling appreciated and seeing your partnership as a strategic asset.

So grab a coffee and a comfy seat and start having a meaningful convo that takes your relationship to the next level. This template's got you covered with the structure, now you need to bring the vibe. Let's get retaining!

Date	MM/DD/YYYY
Presented by	[Your Name/Your Team's Name]
Customer	[Customer Name]

Agenda

Item	Status
1. Introduction	**Completed** ⌄
2. Review of past performance	**Completed** ⌄
3. Customer feedback and concerns	**In Progress** ⌄
4. Product updates and roadmap	**In Progress** ⌄
5. Strategic recommendations	**Blocked** ⌄
6. Q&A	**Not Started** ⌄

This section sets the tone for the entire review. It's an opportunity to reiterate the purpose of the meeting and highlight the main objectives.

Review of past performance

Understanding past performance is crucial for both the service provider and the client. This section provides a snapshot of key metrics, such as usage, support tickets, renewal rates, and NPS scores, allowing both parties to gauge the health of the relationship.

Metric	Previous period	Current period
Usage metrics	[Insert data]	[Insert data]
Support tickets	[Insert data]	[Insert data]
Renewal rate	[Insert data]	[Insert data]
NPS score	[Insert data]	[Insert data]

Customer feedback and concerns

Direct feedback from the client is invaluable. This section captures specific concerns or feedback and the corresponding actions or recommendations. Addressing these concerns head-on fosters trust and transparency.

Feedback/concern	Action taken/recommendation
[Feedback 1]	[Insert action/recommendation]
[Feedback 2]	[Insert action/recommendation]
[Feedback 3]	[Insert action/recommendation]

Product updates and roadmap

Keeping the client informed about past product updates and future roadmaps ensures they are in the loop about the product's direction. It's also an opportunity to gather feedback on these updates and potential future features.

Past updates	Customer feedback
[Update #1]	[Insert customer's feedback]
[Update #2]	[Insert customer's feedback]
[Update #3]	[Insert customer's feedback]
Future roadmap	**Customer feedback**
[Upcoming feature #1]	[Insert customer's feedback]
[Upcoming feature #2]	[Insert customer's feedback]

[Upcoming feature #3]	[Insert customer's feedback]

Strategic recommendations

Every EBR should include forward-looking strategies. This section delves into challenges and opportunities, providing recommendations for each. It's a chance to showcase proactive thinking and offer solutions that align with the client's goals.

Challenge	Recommendation
[Challenge #1]	[Recommendation #1]
[Challenge #2]	[Recommendation #2]
[Challenge #3]	[Recommendation #3]
Opportunity	**Recommendation**
[Opportunity #1]	[Recommendation #1]
[Opportunity #2]	[Recommendation #2]
[Opportunity #3]	[Recommendation #3]

Q&A

An open Q&A session allows for any lingering questions or concerns to be addressed. It's a space for open dialogue and clarification.

Questions	Answers
[Question 1]	[Answer 1]

[Question 2]	[Answer 2]
[Question 3]	[Answer 3]

Next steps and conclusion

While the discussions and insights from an EBR are invaluable, the real impact is felt in the actions that follow. Outlining the next steps ensures that the EBR serves as a catalyst for positive change, driving growth, and strengthening the partnership.

Next Steps	Conclusion
[Action Item #1]	[Key takeaway #1]
[Action item #2]	[Key takeaway #2]
[Action item #3]	[Key takeaway #3]