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The Business Review.

A play: the one motion in Customer Success that is strategic by design — what it is and is not, why it works, the agenda in three movements, the executive runbook, and the checklist.

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CONTROL

A play, not a model.

A model tells you how the organization is built. A play tells a person what to do on Tuesday. This is the first play on the shelf, and it is the one I would hand a new Customer Success Manager in their first week: the Business Review is where everything else in the Operating Model becomes a conversation with a customer.

VERSION	DATE	AUTHORITY	NOTES
1.2	November 2026	Juan Carlos González II	Running the program, from the 2018 business review program at a hospitality-software company in the Vista Equity portfolio: who gets which review, the peering exercise and the digital series; the four-week countdown with the call that opens it; the two-hour executive agenda, the strategy guide and the roles; the runbook cards' labels unboxed
1.1	October 2026	Juan Carlos González II	The joint scorecard: the Partnership Maturity Model, from the Q1 2022 leadership report
1.0	October 2026	Juan Carlos González II	First public edition, rebuilt from the internal briefing (2022) as a Juan.co play

HOW TO USE THIS PLAY

Read pages 4–6 once, for the definition and the reasons. Read page 7 before every review, for the agenda, and pages 8–9 to score the partnership before it. Run page 10 with your account executive for the executive version. Pages 11–13 run the program: who gets which review, the countdown week by week, and the executive agenda and roles. Print page 14 and check it off. The play assumes the Operating Model's vocabulary — milestones, touch models, the four motions — but stands without it.

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WHAT A BUSINESS REVIEW IS

Defined.

A Business Review is a sales-led, success-facilitated exercise with the customer's stakeholders, held to make sure the relationship is driving the right future for both companies — and to unlock what comes next.

Four things in that sentence carry the weight. **Sales-led:** the account executive owns the room, because a review that ends in growth is a sale, and the person accountable for the number should be the person asking for it. **Success-facilitated:** the Customer Success Manager builds it, because nobody else holds the evidence — the health, the outcomes, the signals, the history of every promise made and kept. **With the customer's stakeholders:** plural; a review attended only by your champion is a status call. **The right future for both companies:** this is not a satisfaction survey. It is where two businesses decide, together, what they are going to do.

Done well, a Business Review does two things no other motion does. It unlocks new opportunities to go deeper and wider on an account after it has been held — the expansion that was sitting there unasked-for. And it leads to multiple follow-up tracks of sales-led account work, supported across the company: the review is not the deliverable, the plan that comes out of it is.

> WHERE IT SITS
>
> Moment 20 on the Customer Journey, touching milestone ten of the Operating Model's twelve, the first milestone of the expansion stage — and, of the four motions, the strategic, proactive corner: the conversation is about the customer's business, and the calendar starts it, not a signal. Cadence: quarterly for dedicated accounts, semi-annually for shared, and a quarterly series of emails for digital. Channel: digitally, virtually, or in person — and in person for the ones that matter, because the deliverable is a decision and decisions are made in rooms.

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WHAT A BUSINESS REVIEW IS

Is, and is not.

Most "QBRs" fail because nobody said what one is for. Three things it must be; three things it must never become.

The Business Review is

Timely

Clients should hear from us periodically to discuss the relationship — on a cadence they can count on, not when something has gone wrong.

Relevant

The content is consolidated and actionable for the client's business. Their business — not our product, not our roadmap, until it serves theirs.

Valuable

It leads to a forward-looking action plan. If nobody leaves the room with something to do, it was a presentation.

The Business Review is not

Operational

Clients hear from our teams every day; they receive reporting and communication that drives operational adjustment. None of that belongs here.

Tactical

The review is the opportunity to become more strategic and broaden the nature of the relationship. A ticket list is the opposite of that.

A surprise

Everything presented and discussed should be well anticipated. Coaches guide stakeholders in advance and build new champions on the way in. Nobody learns bad news in a Business Review.

The last one is the one people break. A review is theater in the honorable sense: the outcome is known before the curtain goes up, because the work of the review happened in the three weeks before it — the pre-reads, the one-on-ones, the number nobody wanted to show already shown privately. The room is for alignment, not discovery. If the customer is surprised, you were not timely; if you are surprised, you were not listening.

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WHY

Proactive growth, joint alignment.

Two reasons, and they are the two halves of the Operating Model: the Business Review is how a Customer Success organization behaves like a revenue driver, and it is how the three layers of measurement get shared with the one person who can act on them.

Drive proactive growth

FINANCIAL	Revenue driver
ACTION	Proactive
METRICS	Success-oriented
MODEL	Analytics-focused
GOAL	Predictive

The mature model, in one meeting. A legacy organization reviews the past quarter's tickets. A mature one reviews the next year's plan.

Jointly align on success

ACTIVITY · THINGS WE DO

Touchpoints, escalations, engagements, cases, projects — reported in one line, because it is the least interesting thing in the room.

SIGNALS · SIGNS WE SEE

Health, NPS, satisfaction, expansions, referrals — the layer the review is built on, and the one the customer has never seen assembled.

RESULTS · SUCCESS WE SHARE

Retention, recurring revenue, lifetime value — theirs and ours, side by side. The word *share* is doing the work.

A customer who has seen their own signals laid out against results — adoption against outcomes, outcomes against what they are paying — does not need to be sold an expansion. They ask for it. That is the whole mechanism: a Business Review turns the organization's private evidence into the customer's own conclusion.

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THE AGENDA

Three movements.

Every Business Review covers the same three things in the same order, because the order is the argument: what we did, what is in the way, where we go. Nine items. Do not add a tenth.

1 PROGRESS

1. Review the work we have performed together.
2. Evaluate the joint scorecard of our relationship.
3. Outline our accomplishments and improvements together.

Past tense, shared pronoun. "We" did this. The scorecard is joint — their outcomes and our delivery on one page — because a scorecard with only our numbers on it is a report card, and nobody renews a report card.

2 CHALLENGES

1. Analyze the obstacles and problems we now face.
2. Explore the client's major priorities and how they are evolving.
3. Discuss broader opportunities to deliver business impact.

Present tense. This is the movement that separates a review from a renewal pitch: you spend the middle of the meeting on *their* problems, including the ones you cannot solve, because the priorities that come out of this conversation are what the roadmap in the third movement has to answer.

3 ROADMAP

1. Synthesize how our futures are aligned toward success.
2. Reveal our product roadmap and solution strategy.
3. Recommend follow-up action items and joint initiatives.

Future tense. "Reveal" is deliberate — the roadmap is shown here, not in the first ten minutes, and only the parts of it that answer movement two. The review ends on the third item: a short list of things with names and dates on them. That list is the deliverable.

> **TIME**
>
> Sixty minutes: fifteen, twenty-five, twenty. If progress runs long, you are presenting; if roadmap runs long, you are pitching. The middle movement is the one to protect.

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THE JOINT SCORECARD

The Partnership Maturity Model.

Movement one, item two: "evaluate the joint scorecard of our relationship." This is the scorecard. Six dimensions, each a question both sides can answer honestly; five levels of maturity; one chart that shows the shape of a partnership at a glance.

DIMENSION	THE QUESTION IT ASKS
Strategic alignment	Do we understand and support each other's strategic goals?
Business impact	How effectively do we identify and track business impact?
Joint roadmap	Are roadmaps being shared and aligned?
Solution adoption	Is the breadth of what we offer actually being used?
Support quality	Does the client get the support they need, quickly and effectively?
Program management	Are we managing the relationship as a strategic whole?

1
Ad hoc
Engagement takes place, but it is reactive and not documented.

2
Process defined
Standard business processes are defined and agreed upon.

3
Executing
Business processes are followed consistently and measured.

4
Optimizing
Deliberate process improvement with defined success metrics.

5
Market leading
We set the standard for the discipline, together.

Score every dimension from one to five — and score it twice, once by us and once by the customer's champion, before the review. Where the two scores agree, you have a fact. Where they disagree by two or more, you have the most useful ten minutes of the review, and you have found them before the meeting rather than in it. The scores are the scorecard; the *gap* between the two sets of scores is the agenda for movement two.

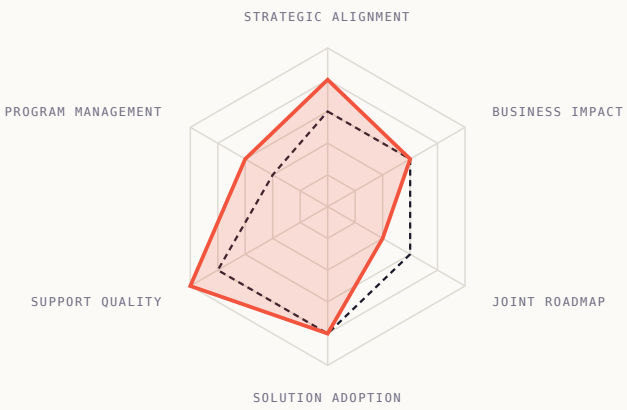
> WHY FIVE LEVELS AND NOT A PERCENTAGE
>
> A percentage invites argument about the number. A level invites argument about the definition — "are our processes actually *measured*?" — which is the argument you want to have, because it ends in an action.

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THE JOINT SCORECARD

Reading the chart.

Six scores make a shape. Draw it, and draw the peer group's shape underneath — the other accounts in the same tier and industry — and the partnership explains itself.



The account — scored at the last review. This one is strong on support quality and solution adoption, honest about program management, and weak on the joint roadmap: a customer who uses the product well and is happy with the help, but who has never seen where we are going together.

The peer group — dashed, the median of accounts like this one. The account leads its peers on support and trails them on roadmap and program management. That is not a judgment of the customer. It is a judgment of how we have managed the relationship, and it says exactly which movement-three items to bring.

Illustrative scores. A radar with six axes, one per dimension, scaled one to five from the center.

Three shapes to learn to read. A **small, round** shape is a new or neglected account — everything is ad hoc, and the first review's job is to define processes, not to optimize them. A **spiky** shape is the common one: strong where a person has cared, weak where nobody owns it, and the spikes tell you who that person is. A **large, round** shape at level four or five is the account you should be learning from — and the one whose executive belongs in your peer-group analysis, because they will tell the others how it was done.

Over time the chart becomes the best picture of the book you have: every dedicated account scored each quarter, overlaid by tier, by industry, by CSM. The accounts whose shape grew are the ones where the plan from the last review was done. The ones whose shape did not are the ones to ask why — before the customer does.

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THE EXECUTIVE BUSINESS REVIEW

Review, plan, execute.

For enterprise accounts the Business Review becomes an executive motion — the customer's leadership in the room, and ours. Same three movements on the day; three more weeks of work before it. This is the runbook.

THREE WEEKS OUT

Review

SUCCESS AND SALES

Evaluate the current state of the business against our success plan and our account plan.

- Identify measurable business results.
- Outline the key achievements.
- Establish agreement on outcomes.
- Prep internally across sales, marketing, success and support.

TWO WEEKS OUT

Plan

US AND THE CLIENT'S CHAMPIONS

Touch base with the client champions and build a joint plan — and pre-game the review with them.

- Deliver new insights together.
- Agree on the timeline and the attendees.
- Prepare a draft agenda.
- Take early stakeholder feedback, and iterate.

THE WEEK OF

Execute

SUCCESS AND THE CROSS-TEAM

Prepare the customized deliverables; rehearse internally, and with the client.

- Deliver the Business Review.
- A tightly scripted agenda.
- Drive actionable outcomes.
- Stay on task; leave with the follow-up action plan for our work together.

Two things about this that are not obvious from the columns. The **plan** phase is done *with the customer's champions*, not for them — they see the draft, they shape the attendee list, they tell you which executive needs to hear which number. By the day of the review your champion is co-presenting, and a champion who has co-presented a plan to their own leadership is a champion for the life of the account. And **rehearse with the client** means exactly that: the pre-game is a dry run, not a courtesy call. Nothing in an Executive Business Review is said for the first time in the Executive Business Review.

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RUNNING THE PROGRAM

Who gets which review.

Every customer gets a Business Review; the key accounts need more. In 2018 I graded the book and gave each grade its own review — and the shape has held everywhere since. The grade is the account's touch tier; the review follows it.

DEDICATED · EVERY QUARTER

Customized, in the room

KEY STRATEGIC ACCOUNTS

A presentation built for this customer, held in person or live with their key stakeholders — properly peered. An agenda planned with the client, and an internal strategy guide for our side. Scheduled in order of size and of the customer's ability to meet.

SHARED · EVERY SIX MONTHS

Templated, chosen

THE MIDDLE OF THE BOOK

A template, with the slides chosen from options: one story for growth, one for steady, one for a dip — and never more than two or three features to adopt. Sent by email, with an optional call to talk it through. Scheduled in order of size.

DIGITAL · EVERY QUARTER

A series of emails

EVERYONE ELSE, ALL EQUALLY

One email a quarter, from the Success Manager's own name: an adoption idea, then another, then an insight report, then the case for doing more. Measured by what it is for — the share of recipients active again within thirty days.

Peer

WHO COMES

Before a dedicated review, run the peering exercise. Find the customer's decision-maker, and whether that person is also the point of contact. Then make sure every attendee from the customer has a proper peer from our side — one of ours can peer with several of theirs, but nobody of theirs sits without one. An executive across from a junior rep is a review that ends in a polite nothing.

WHEN THE REVIEW FINDS TROUBLE

A review is the wrong place to fix a problem and the right place to find one. Usage falling off: run the Adoption Workshop. A request that needs an answer: the Feedback Cycle. Problems piling up: the Success Initiative. Then come back to the review on its own cadence.

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RUNNING THE PROGRAM

Four weeks out.

The executive runbook on page 10 is three movements; this is the same work at the level of the week, for every dedicated review. Two tracks run side by side: what we do inside, and what we do with the customer.

WHEN	INSIDE	WITH THE CUSTOMER
Four weeks	Decide our attendees: the Success Manager, a support lead, and an executive sponsor.	The opening call with the point of contact — what the review is and why it matters; time, place and channel; who on their side should attend; a draft agenda to agree.
Three weeks	The first internal meeting: the draft agenda reviewed, the deck started. Travel booked if it is in person.	Logistics, attendees and agenda confirmed and signed off; a calendar hold sent; a draft of the deck delivered.
Two weeks	A walkthrough of the presentation — a walkthrough, not a dress rehearsal — and the strategy guide written.	The deck finalized and signed off. Logistics re-confirmed to the room: the space, the screen, the connection.
One week	The dress rehearsal: "pretend this is it." The strategy guide finalized.	Everything re-confirmed. The customer has briefed their own attendees. The deck is attached to the invitation.
The week of	The review. Then begin planning the next one.	Send the notes you took and the final deck, with the action items and their owners.

The call that opens it

Why
WHAT IT COVERS

"It's a chance to finally put a face to a name. We'll look at the goals you set and what came of them; at where your business stands against your industry, and where our roadmap can help; and at our partnership — whether you see the value not only in the product, but in me and my team as your advocates."

Ask
BEFORE YOU HANG UP

Would you like to schedule it, and when — with a few weeks to prepare? Who on your team would benefit from being there? Is there anything specific you want to talk about? Then follow up by email the same day, with what you agreed and the draft agenda.

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RUNNING THE PROGRAM

Two hours, and the roles.

For an executive review, the three movements stretch to two hours, and our side walks in with a strategy guide and a part for each person. The meeting's objective, in one line: evaluate the partnership, review the customer's objectives, analyze the insights, and align the roadmap for the next 90 to 180 days.

MINUTES	SEGMENT	GOAL
15	**Introductions**	Both teams: who we are, how we work, titles, roles and responsibilities.
15	**The review's purpose**	The objective, the agenda, and the deliverables the customer will leave with.
30	**Their initiatives**	Progress against the goals set last time; what each side did to advance them; the new challenges and opportunities.
30	**Insights**	Their position in the industry, their performance, and where the roadmap meets their opportunities.
25	**Our partnership**	An honest look at the state of it: service levels, feedback, where we should invest next together, and goals for the next 90 to 180 days.
5	**Next steps**	Outcomes and actions, with owners, milestones and dependencies; the parking lot — what we could not get to, and when we will; what they will receive, and when.

THE STRATEGY GUIDE

One page, ours only

The objective; both sides' attendees, peered; the logistics; the pre-reads — agenda, deck, last review's notes, the account's tracker and health. Then the strategy: the account's health, what this meeting must win, the politics in the room, and the do's and don'ts.

THE ROLES

A part for each person

The facilitator runs the agenda and the clock. **The instigator** asks the question nobody else will, and takes the notes. **The executive** brings the view from above the account — the industry, the competition, the roadmap.

THE DECK

A discussion, not a deck

Strip the coaching notes before it is sent. Open on their goals from last time. Show their numbers straight — up, steady or down. Start the partnership section with the roadmap. Leave the floor open for their goals; they are the first slide of the next review.

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THE CHECKLIST

Print this page.

BEFORE — THREE WEEKS OUT

- [ ] Account plan and success plan read; the gap between them written down
- [ ] Measurable business results identified, with the customer's own numbers where we have them
- [ ] Partnership Maturity scored by us, six dimensions, one to five
- [ ] The same six scored by the champion; the gaps noted
- [ ] Joint scorecard drafted: their outcomes, our delivery, the chart, one page
- [ ] Health, NPS, satisfaction, usage trends assembled — the signals layer
- [ ] Expansion and referral opportunities listed, with the evidence for each
- [ ] Internal prep held: sales, marketing, success, support in one room
- [ ] Any bad number shown to the champion privately, now

BEFORE — TWO WEEKS OUT

- [ ] Champion meeting held; insights delivered together
- [ ] Attendee list agreed — their stakeholders, plural; ours, including the executive
- [ ] Timeline and venue agreed; in person for the accounts that matter
- [ ] Draft agenda sent: progress, challenges, roadmap — nine items
- [ ] Stakeholder feedback taken; agenda iterated
- [ ] Champion co-presenting at least one movement

BEFORE — THE WEEK OF

- [ ] Customized deliverables prepared; nothing generic in the deck
- [ ] Roadmap items chosen to answer movement two, and only those
- [ ] Internal rehearsal held, timed: 15 / 25 / 20
- [ ] Rehearsal with the client held
- [ ] Follow-up action plan pre-drafted, with owners

DURING

- [ ] Opened on the joint scorecard, not on our logo
- [ ] Movement two protected; their priorities, in their words, captured
- [ ] Roadmap revealed in the third movement, not before
- [ ] Closed on named actions with dates
- [ ] No surprises — ours or theirs

AFTER — WITHIN A WEEK

- [ ] Action plan sent, with owners and dates, to every attendee
- [ ] Follow-up tracks opened as sales-led account work, supported across the company
- [ ] Success plan and account plan updated
- [ ] New champions noted; next review scheduled
- [ ] What we learned written into the next review's first movement

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