

How to Do a QBR

(AKA Portent's QBR Cheat Sheet)

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How Should You Run a QBR?

A Quarterly Business Review (QBR) helps you and your client contacts affirm goals, evaluate the channels you're utilizing, and identify opportunities to pivot or dig deeper into the strategies you're using.

The format and formality might vary from client to client for internal and client-facing QBRs, yet at a minimum, a QBR should highlight wins, challenges, and opportunities.



1. Goals

Review and affirm the specific, tangible quantitative and/or qualitative goal(s) that you set with your client. List their annual and/or quarterly objectives. Your next slides should illustrate overall progress (YOY and YTD) toward those goals and KPIs.

Good Examples:

- Double traffic to <landing page> from paid sources, increase from 35% to 70% of traffic
- Improve product specials landing page conversion rate by 20% YOY

Bad Examples:

- Improve product specials landing page conversion rate.
 - *Rephrase this to focus either on an assessment of page and/or implementation of recommendations toward a quantitative conversion rate increase or improvement in a specific segment or channel (e.g., Increase paid social conversion rate from new customers by 2%).*
- Create content hubs for top keywords.
 - *Rephrase this to be more specific about the goal of the content hub (search visibility, UX), perceived improvement, as well as the the priority topic or keyword (e.g., Increase share of voice (five more keywords in top 10 rankings and 3% increase in coverage) by creating a content hub for their **relevant head term**).*

2. Wins

Celebrate your successes! Wins should always tie back to goals and KPIs for the past quarter. They should have a quantitative component and communicate an impact on the client's business. These could include campaign optimizations, search visibility gains, and recommendations that were implemented.

Good Examples:

- Moved to page one for top keyword priority, improving search visibility by X%.
- Gained answer box for "ABC." Moving to position zero drives X clicks on average.

Bad Examples:

- We audited your blog.
 - *Rephrase to: 14 actionable recommendations; approved/implemented to increase search visibility for X; keyword on top blog landing pages.*
- Continued growth in conversions and engagement from organic traffic.
 - *Rephrase to: Organic visitors are up 58% and converting at an average rate of 9%.*

3. Challenges

This is your opportunity to honestly speak to what kept you and the client from meeting the goals you set. Acknowledge the elephant in the room or address any ongoing concerns (e.g. recommendations aren't being implemented, metrics are changing, prioritization is needed, etc.). Creating a space to discuss these challenges opens the door for client feedback as well.

Good Examples:

- Organic and direct conversion rates were down 30% YOY in August. They will continue to slide without a cohesive mapping of customer journeys on the site.
- Four separate CRO projects are still awaiting feedback or approval: *Contact Us Page Experience Wireframe, HVAC Page Content Updates, Form Content Updates, and Branded PPC Landing Page Updates.*

Bad Examples:

- Outreach traction with niche publications.
 - *Rephrase to: <#> outreach pitches with niche publications have yielded no engagement.*
- SEO recommendations weren't implemented.
 - *Rephrase to: <#> of SEO recommendations focused on <keyword/topic> search visibility have not been implemented.*

4. Opportunities

Share what else you can do to leverage existing or new services to help the client meet their goals. For example, a competitive analysis on a specific section of their site or topic, focused keyword research, testing CRO or paid social, or increasing domain and page authority with outreach and SEO collaboration. This is a natural time to lean into celebrating what you've done for clients, get excited about what's next, and upsell on tactics and new strategies.

Good Examples:

- Optimize mobile site to improve conversion rate. 50% of visitors use mobile devices.
- Optimize homepage hero by testing customer success stories and guided tour content.

Bad Examples:

- Update content on the HVAC pages.
 - *Rephrase to: Optimize HVAC pages for ABC keyword to improve traffic by estimated X%.*
- The mobile site has some usability issues.
 - *Rephrase to: Employ usability testing to identify specific improvements for mobile site.*

5. Recommendations for the Next Quarter

You should now reaffirm the goals outlined at the beginning of the meeting and make sure your recommendations line up with the roadmap, KPIs and deliverable opportunities applicable for the next quarter.

Good Examples:

- Increase search visibility focus in Q4, optimizing new “how-to” articles for Google answer boxes.
- PPC: Shift 50% of the budget to top-of-funnel programmatic advertising (minimum 1-month test).

Bad Examples:

- Email sign-up, communication and retargeting.
 - *Rephrase to: Implement a strategy for capturing email addresses and engaging users via email.*
- Increase conversion rates.
 - *Rephrase to: CRO: test and improve CTAs on HVAC pages, mobile site.*