

QBR Template

9-slide structure used for every named-account quarterly review.

SLIDE 1

Agenda

- 1. Q[X] performance vs. plan
- 2. Wins & lessons
- 3. Roadmap & product updates
- 4. Growth & expansion opportunities
- 5. Risks & mitigation
- 6. Q[X+1] commitments

SLIDE 2

Executive Summary

METRIC	Q[X-1]	Q[X]	Δ
Patients acquired	—	—	—
Active subscribers	—	—	—
GMV	—	—	—
Refund rate	—%	—%	—
NPS	—	—	—

SLIDE 3

Performance vs. Plan

- What was committed last quarter
- What was delivered (RAG status)
- Variance commentary

SLIDE 4

Wins of the Quarter

- Three quantitative wins
- One qualitative testimonial

SLIDE 5

Lessons & Friction

ISSUE	IMPACT	RESOLUTION	OWNER
—	—	—	—

SLIDE 6

Product Roadmap

- Features shipped this quarter that this client uses
- Features shipping next quarter that affect this client
- Beta opportunities

SLIDE 7

Growth & Expansion

- New treatment categories or SKUs
- Volume tier upgrades
- New brand / sub-brand opportunities
- Reporting / analytics add-ons

SLIDE 8

Risks & Mitigations

RISK	SEVERITY	MITIGATION	OWNER
—	—	—	—

SLIDE 9

Q[X+1] Commitments

COMMITMENT	OWNER	DUE
—	—	—