Review the outcome. Agree what comes next.

{Customer} / {Quarter and review date} / {Your team}

THE AGREED OUTCOME

{What did the customer want to achieve?}

{Why does that outcome matter now?}

TODAY'S DECISION

{What should both teams agree before this review ends?}

Fill-in prompts, not customer results. Replace all placeholders before sharing.

Start with the promises from the last review.

Confirm whether the customer's goals or success measures have changed.

Agreed outcome	Success measure	Evidence / period	Owner
{Outcome 1}	{Metric and target}	{Source and dates}	{Customer / team}
{Outcome 2}	{Metric and target}	{Source and dates}	{Customer / team}

Record changed goals before scoring performance against the previous plan.

Compare actual results with the same target.

Define the measure, period and denominator before explaining a change.

Metric / period	Target	Actual	Gap	Source
{Defined metric}	{Target}	{Actual}	{Actual – target}	{Evidence}
{Defined metric}	{Target}	{Actual}	{Actual – target}	{Evidence}

Fictional check: 64 active accounts against a target of 80 = 80% of target. It is not an adoption rate without the eligible-account denominator.

Separate what happened from why it happened.

A result and an event occurring in the same quarter do not establish cause.

CONFIRMED

{What does the evidence establish?}

{Source and limit}

STILL UNCERTAIN

{What explanation needs checking?}

{Alternative explanation}

NEXT CHECK

{What would distinguish the explanations?}

{Owner and due date}

Make next quarter’s commitments reviewable.

Name an owner on each side and the evidence both teams will review.

Commitment	Customer owner	Our owner	Checkpoint / evidence
{Bounded action}	{Name / role}	{Name / role}	{Date and measure}
{Bounded action}	{Name / role}	{Name / role}	{Date and measure}

Keep proposed commitments separate from actions the customer has already approved.

Expose the condition that could change the plan.

Discuss the dependency while there is still time to respond.

DEPENDENCY OR RISK

{What must be available or resolved?}

{Who can act on it?}

RESPONSE AND TRIGGER

{What signal means we should change course?}

{Support needed from each team}

Close with a shared next step.

Send a short written record after the meeting and check it with both owners.

AGREED

{Decision and scope}

{Conditions, customer owner and our owner}

NEXT REVIEW

{Checkpoint date}

{Evidence to bring and open questions}

For an internal operating QBR, adapt the ownership and resource decisions to your team.