A FIELD GUIDE · CUSTOMER SUCCESS

# The 15-Minute QBR, Automated

The framework for running a quarterly business review executives actually show up to, and how to generate the prep in 45 seconds instead of five hours.

| 15 min | 3 sections | 45 sec |
| --- | --- | --- |
| THE MEETING | THE FRAMEWORK | THE PREP |

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Framework by Andrea Bumstead, Founder and CEO of CS Impact and creator of the 15-Minute QBR.
Automation sections by Statisfy.

START HERE

# What this guide covers

The framework, the automation, and what changes when you have both.

The QBR should be the highest-value meeting you have with a customer. It broke because it turned into a 90-minute recap of information the customer ultimately didn't care about.

The 15-Minute QBR fixes the meeting: three sections executives actually care about, delivered in fifteen minutes. The value they're getting, how they can get more, and what you recommend they do next. The remaining problem is prep, which by hand still takes three to five hours an account. That's the part that doesn't scale, and it's why most CSMs run this motion for their top 20 accounts and nobody else.

PREP TIME FOR ONE QBR




Across a book of 50 accounts, that difference is measured in weeks per quarter.

01 · THE CASE FOR CHANGE

# Why the 90-minute QBR stopped working

A view from both sides of the table.

When I was a VP of Customer Success, I declined almost every QBR a vendor ever invited me to.

I knew exactly how those meetings would go. An hour of the vendor walking me through their new investments, their roadmap, their team, and how my company was using their product. Very little of it had anything to do with my business or the problems I was trying to solve. I didn't have time for it, so I said no.

Then I'd turn around and ask my own team how many QBRs they had run that month. QBR count was one of our core metrics, a leading indicator we watched closely. I was declining the exact meetings I was asking my team to run.

And those meetings were expensive to build. A single QBR could take a CSM three to five hours to prepare: pulling usage metrics, digging up the success plan, combing through old call notes, chasing marketing for slides.

The 15-Minute QBR came out of a training session. A CSM put up her hand and asked, “How do I get executives to show up to my QBR?” It's one of the most common questions I hear, and I'd lived it from both sides. I said, “Run it in 15 minutes.”

She gave me a very strange look. So I explained. Every executive has 15 minutes. You can get 15 minutes with almost anyone. What you can't do is waste them, because when it comes to your product, an executive only cares about two things:

**1** **Am I getting value from this?**

Sections 1 and 2 answer this

**2** **Should I keep paying for it?**

Section 3 answers this

Every minute of the QBR should answer those two questions. That's where the three sections come from: the value they're getting today, how they can get more, and three recommendations for what to do next. Everything else is just fluff.

> **The framework fixed the meeting. The prep still took hours**, and that's the part teams can now automate with Statisfy.

02 · HOW TO PREPARE

# The 15-Minute QBR framework

Three sections, fifteen minutes, and the two questions every executive is actually asking.

1

**The value they are getting**

Outcomes against the problem they bought you to solve.

2

**How they get more value**

Benchmarks, gaps, and the ambition they have not set yet.

3

**Three next steps**

Concrete actions with an owner on each side and a date.

## 1. The value the customer is getting

PROVE THE OUTCOME, NOT THE ACTIVITY

Use data and insights to show the value the customer is getting today: time saved, efficiency gained, revenue increased. Tie it back to the specific business challenges they bought you to solve, and show the outcomes your product is producing, not just how often it's used.

HR / RECRUITING

“Since you moved interview scheduling onto the platform, time-to-hire for engineering roles has dropped from 41 days to 28. That's the hiring backlog your VP of People flagged when we kicked off.”

IT SECURITY

“Your team resolved 92% of phishing reports automatically this quarter, without an analyst touching them. That's roughly 300 hours your SOC got back for real threats.”

## 2. How they can get more value

BENCHMARK THE GAP, THEN SET THE AMBITION

Use your expertise, customer benchmarks, and best practices to show them how they could be getting more. Share how similar customers are maximizing impact, and identify the gaps where they're leaving value on the table.

This is where you set the ambition. Most customers don't know everything that's possible with your solution, so show them. Walk them through a use case or workflow they haven't thought of yet, and get them thinking bigger.

**ACCOUNTS PAYABLE**

“Companies your size that turn on automated three-way matching are cutting invoice processing time by about half. Your team is still matching POs by hand, and that's where most of your late-payment fees are coming from.”

**SUPPLY CHAIN**

“Right now you're using us to track inventory. A few of our manufacturing customers use the same data to predict stockouts two weeks out and reorder automatically. Let me show you how that would work for your top 50 SKUs.”

### 3. Three recommendations for next steps

**CONCRETE, OWNED, AND DATED**

Expand usage to another team, adopt a high-value feature, build a new workflow, or consider a complementary solution. Align them with the customer's long-term vision and strategy, not with your roadmap.

> **Three, not five.** Five recommendations is too long, and this is meant to be immediately actionable.

Make the next steps concrete: which systems need to be connected, which workflow needs to be mapped, and who from each side owns it. For more technical work, this is often where a forward-deployed engineer or TAM joins the conversation, so the customer leaves knowing exactly how to get from “that's possible” to “that's live.”

**DEVOPS**

“Recommendation one: connect your incident data from PagerDuty so the platform can flag the services causing the most repeat outages. Your platform lead and our engineer can set up the integration in a single working session.”

**CONTRACT MANAGEMENT**

“Recommendation two: extend the platform to procurement. They're reviewing vendor contracts the same manual way your legal team did before rollout. We'll map their approval workflow with your procurement director before month end.”

**03 · HOW TO DELIVER**

# Generating the QBR instead of building it

Where the data comes from, how the draft is assembled, and what the CSM still owns.

The framework tells you what the meeting should contain. It does not give you back the three to five hours it takes to assemble it.

That prep time is where the motion dies. A CSM covering 40 accounts cannot spend four hours per account per quarter, so the framework gets applied to the top ten and the rest get a renewal notice. **This is the part Statisfy automates: not the conversation, the assembly.**

THE SYSTEMS THE ACCOUNT ALREADY LIVES IN




100+ native integrations, bi-directional. The data is indexed rather than piped into a prompt, so the agent can compare this customer against similar ones. One environment holds 4,882 accounts and over 200 million tokens of signal.

## How the QBR gets generated

ONE SENTENCE, FORTY-FIVE SECONDS

**“Hey Stella, generate a QBR for Acme Corp, renewal in 3 weeks.”**

- Pull product usage and adoption trends, last 90 days — 2s
- Read the last six call transcripts for sentiment and open topics — 5s
- Check open support tickets and resolution status — 3s
- Identify expansion signals and risks from CRM and email — 4s
- **Generate the summary, health narrative, and next-steps slide** — 31s

## 45 seconds, against three to five hours by hand.

What comes out maps directly onto the three sections of the framework:

| Framework section | What Statisfy assembles for it |
|---|---|
| **1. The value they are getting** | The outcome, not the usage count: what changed for their business this quarter, tied to the challenge they bought you to solve, with the drivers named. |
| **2. How they get more value** | Benchmarks against similar customers, the adoption gaps where value is being left on the table, and the workflows they have not switched on yet. |
| **3. Three next steps** | Three concrete actions, each naming the system to connect, the workflow to map, or the team to extend to, with an owner on both sides. |




**The generated QBR.** Value metrics on the left answer section one. Mutual action items on the right, each with an owner and a status, answer section three. The whole thing is shared live with the customer. Laid out as it appears in the Statisfy demo environment.

> **The last mile is the CSM's job, on purpose.** The draft arrives assembled. What it cannot supply is the context the CSM holds: the reorg mentioned off the record, the budget cycle, the relationship read. Health scores carry an under-5% override rate, so the CSM adds judgment rather than fact-checking the machine.

04 · HOW TO TRACK WHAT HAPPENS AFTER

# The success plan as memory

How three recommendations survive the eighty-nine days between QBRs.

Most QBRs generate three commitments and then go quiet for 89 days. The next one opens with a CSM trying to reconstruct what was agreed last time, which is why so many QBRs repeat themselves.

> **In Statisfy, the success plan is the account's memory.** Not an internal account plan the customer never sees, but a structured record of goals, risks, and next steps that is shared with the customer and regenerated from live context whenever it is asked for.

**On demand**

A CSM asks, in Slack or Stella.

Goals, risks and next steps are built fresh from the same knowledge graph the QBR used.

**It regenerates rather than loads, so it reflects what is true today.**

**Event-triggered**

Nobody has to ask.

- Health drops, risk escalation fires
- Renewal hits 60, 30 or 14 days
- A champion goes quiet
- CRM next-step and forecast fields update themselves

Two things feed that memory after the call. **NoteTaker captures the conversation** and extracts action items, so what was agreed becomes tasks rather than somebody's recollection. And **the plan is shared with the customer rather than filed internally**, which turns three recommendations into a joint commitment with names against them.

**So the next QBR does not start from zero.** It starts from what was agreed, what moved, and what did not, which is exactly the evidence section one asks for.

05 · THE USE CASE THIS CHANGES MOST

# The long tail

The accounts that have never had a QBR, and what it takes to reach them.

Everything above is useful for a named enterprise account. It changes the math entirely for the accounts that have never had a QBR at all.

ONE CSM, 40 ACCOUNTS



**10 get a real QBR.** The other 30 are where churn hides: silent risk and renewals that slip.

Ten get real attention. The other thirty get a quarterly newsletter and an auto-renewal notice, not because the CSM does not care, but because hours of prep times thirty accounts is not a number that exists. The combination is what unlocks them:

- **The framework makes the meeting short enough to be worth booking.** Nobody schedules a 90-minute QBR for a $40K account. Fifteen minutes is a calendar invite people accept.
- **The automation makes the prep cheap enough to be worth doing.** 45 seconds per deck means thirty accounts is a morning rather than a quarter.

## What it looks like in practice

I've seen teams take the 15-Minute QBR into the long tail, and the story is always the same at the start. They wanted to reach those customers but couldn't. There were never enough hours, so the smaller accounts got a renewal notice and not much else.

Once the prep is automated, that changes. Teams are sending 15-minute QBRs to accounts that never had one, either as a short recorded video or as a live call. With the information surfaced automatically, the

CSM's only job is to get on the call and deliver it. And when the action items are captured and tracked afterward, nothing falls through the cracks between QBRs.

> **That is the actual unlock:** not a faster QBR for the accounts that already get one, but a real value conversation for the accounts that never did.

CLOSE

# Run it this quarter

The framework is free. The automation is what makes it scale.

The 15-Minute QBR works because it answers the two questions every executive is actually asking: *Am I getting value from this?* and *Should I keep paying for it?* Run it with your next customer this quarter.

The automation is what makes it survive contact with a full book of business. Statisfy is one way to do that, and it is the one CS teams at Observe.AI, Mixpanel, Eightfold.ai, Cerby, Safe Security, Illumio, Skyflow, Gremlin, Sendoso, and Milestone already run.

> *"Our GRR is up 2%+ this year with Statisfy and their actionable customer health insights."*
>
> Deepak Kumar, CCO, Observe.AI

### Try it on your own accounts

Bring one account you would normally spend hours prepping, ask Statisfy to generate the QBR, and see how much of the framework comes back filled in. That is the whole evaluation.

**See it on the Statisfy platform →**

Andrea answers the questions she is asked most often about running the 15-Minute QBR in her implementation guide: [qbr.csimpact.ca](qbr.csimpact.ca). Setup on the Statisfy side takes three weeks and under four hours of your team's time.

Statisfy

Framework © Andrea Bumstead. Automation sections by Statisfy.
Product screenshot is from the Statisfy demo environment; account names are fictional.