PandaDoc

# How to Set Up Your Quarterly Business Review (QBR) Template in PandaDoc

If you’ve made it this far, you know how critical it is for your Customer Success team to have frequent, high-value conversations with clients — without a massive investment of manual effort.

**To have those conversations that keep clients using your product or service, expanding their usage, and renewing their contract, your staff needs to be informed.**

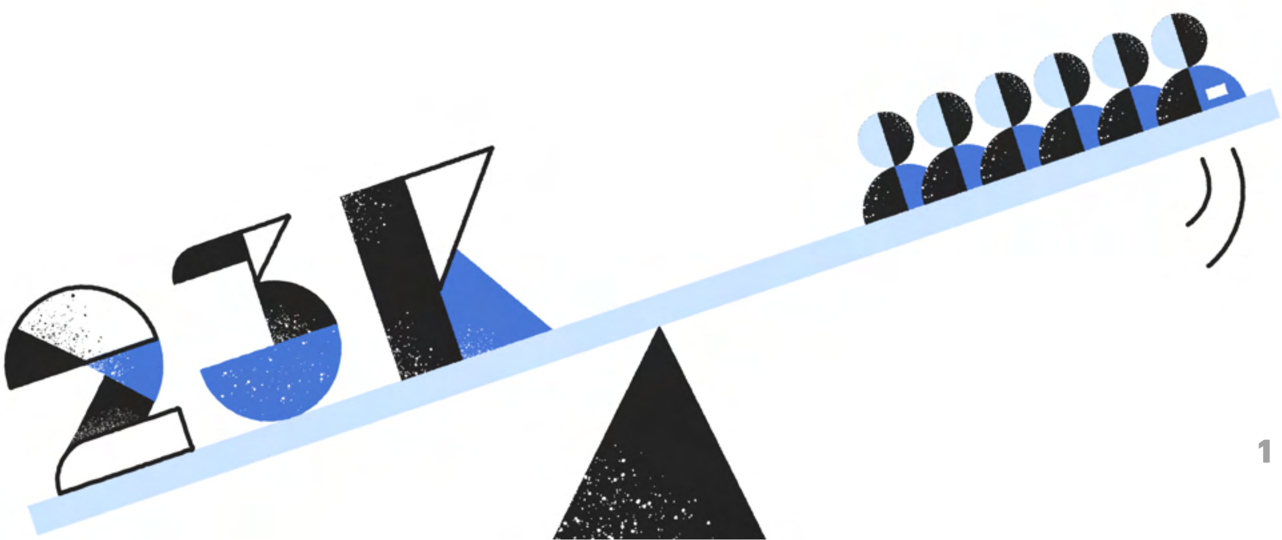
- Who uses the product or service, and how?
- What are their goals and motivations?
- How have they engaged with the product or service recently?
- Where could you help them move the needle?

Capturing all this data manually takes time — and lots of it. At PandaDoc, we feel your pain. In order to prepare for Quarterly Business Reviews, our Client Success Managers (CSMs) used to spend

# 1+ hours per deck

to gather critical inputs like account data, client objectives, success metrics, usage, adoption,and support tickets.

With **23,000 customers** under management across **a team of 6 CSMs**, this amount of manual effort was unsustainable for the long term.



So, we decided to create an automated QBR process using PandaDoc's Template function. The results have been nothing less than amazing:

**QBR prep time** dropped by

**83%**

from over an hour down to 5 minutes or less

**Customer health** as measured by the likelihood of a customer to stop using the PandaDoc app, increased by

**4.4%**

**Account health value** as measured by adoption and usage for all users in one account, increased by an average of

**2%**

It's so effective for us that we want to share it with Customer Success teams across the globe. Like us, we know you wrestle with this problem every day.

If you want to learn more about how this automated QBR process came to be, feel free to **watch our webinar** or **read our blog** post explaining the process in more detail.

We also recommend that prior to creating your own QBR template, you map out your customer journey and translate it to the types of assets your CS team needs (QBR decks being one). Here's a great resource to that effect:

- **How to Create an Effective Customer Journey Map**

# Building Your Own QBR Template in PandaDoc

If you're ready to get started, you'll need a few things:

- A copy of your standard QBR slide deck
- A list of the systems you use internally to pull data for your slide deck
- Access to your PandaDoc workspace

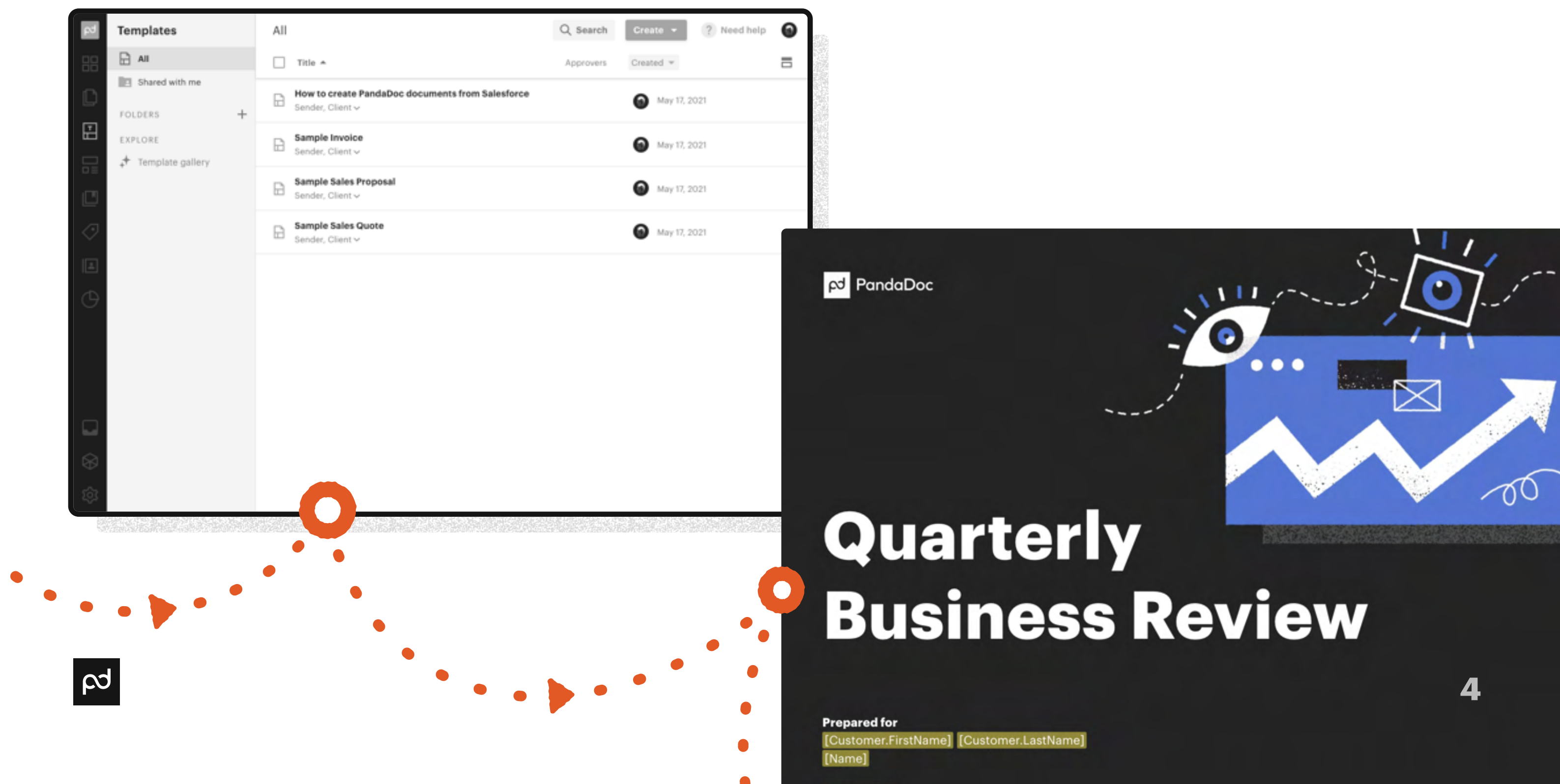
## Pro Tip

If all of the customer data you need is in Salesforce and/or HubSpot, you're all ready to go from a data perspective. HubSpot and Salesforce both have pre-built integrations with PandaDoc, so you can pull in relevant data inputs using the token and variable functions in PandaDoc. For more on how to do access data from HubSpot and Salesforce, check out our help documentation:

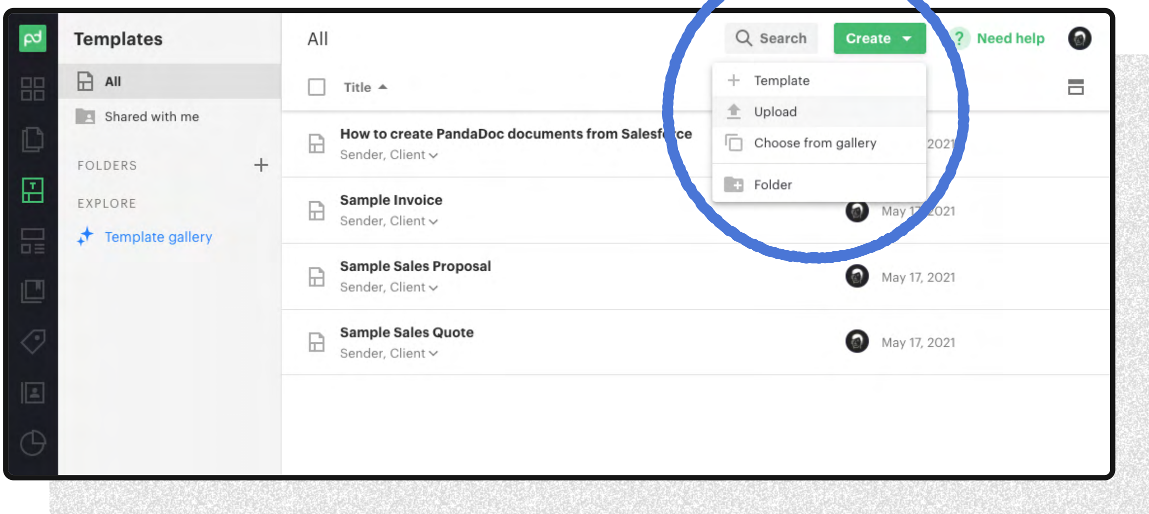
- **Push information from HubSpot to PandaDoc**
- **Pull data from Salesforce to PandaDoc**

If you have data sources other than Salesforce and HubSpot, say Tableau, contact your CSM for more information on the PandaDoc API.

When you have your data sources ready, the best way to proceed is side-by-side. Pull up your PandaDoc workspace in one window and your QBR slide deck in another window.



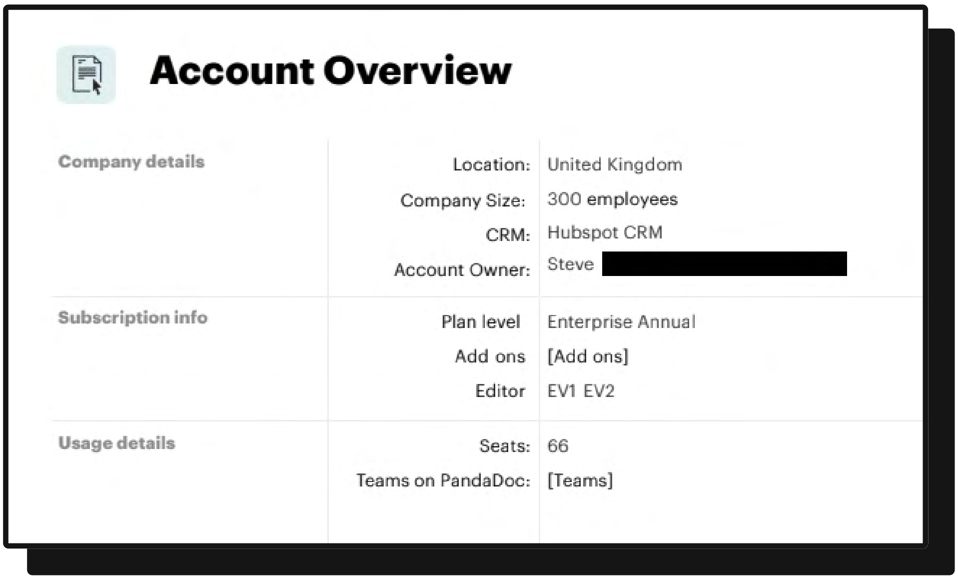
To build your QBR template, you can either create a new template or choose from the **PandaDoc template gallery**. Hint: in the template gallery is the PandaDoc QBR template. Rather than creating your own from scratch, you **can start with ours** and modify as you go.




From there, it’s a matter of going through each page and replicating how you built it in your slides. For this first slide, you’ll want to include:

- A text block for the title
- Another text block for "prepared by"
- Variables that pull in the CSM name, the client name, and the preparation date
- A background color
- A header image and your logo

Now let’s look at a more complex slide. Here’s our PandaDoc slide that pulls the customer’s account data, billing info, and usage details.




For this slide, you’ll need to create a table on the slide, enter the text blocks, and then add the variables that pull in data like the plan level, number of seats, and CRM.

For the last example, here’s a graphical representation of customer data pulled from our PandaDoc success metrics. These success metrics help us show customers how they are using our platform — and where they might get more out of it.

This part of the process will depend on where your success metrics live. For PandaDoc, our success metrics are housed inside Tableau. The graphs are created in Tableau and then pulled into the QBR template using custom tokens.

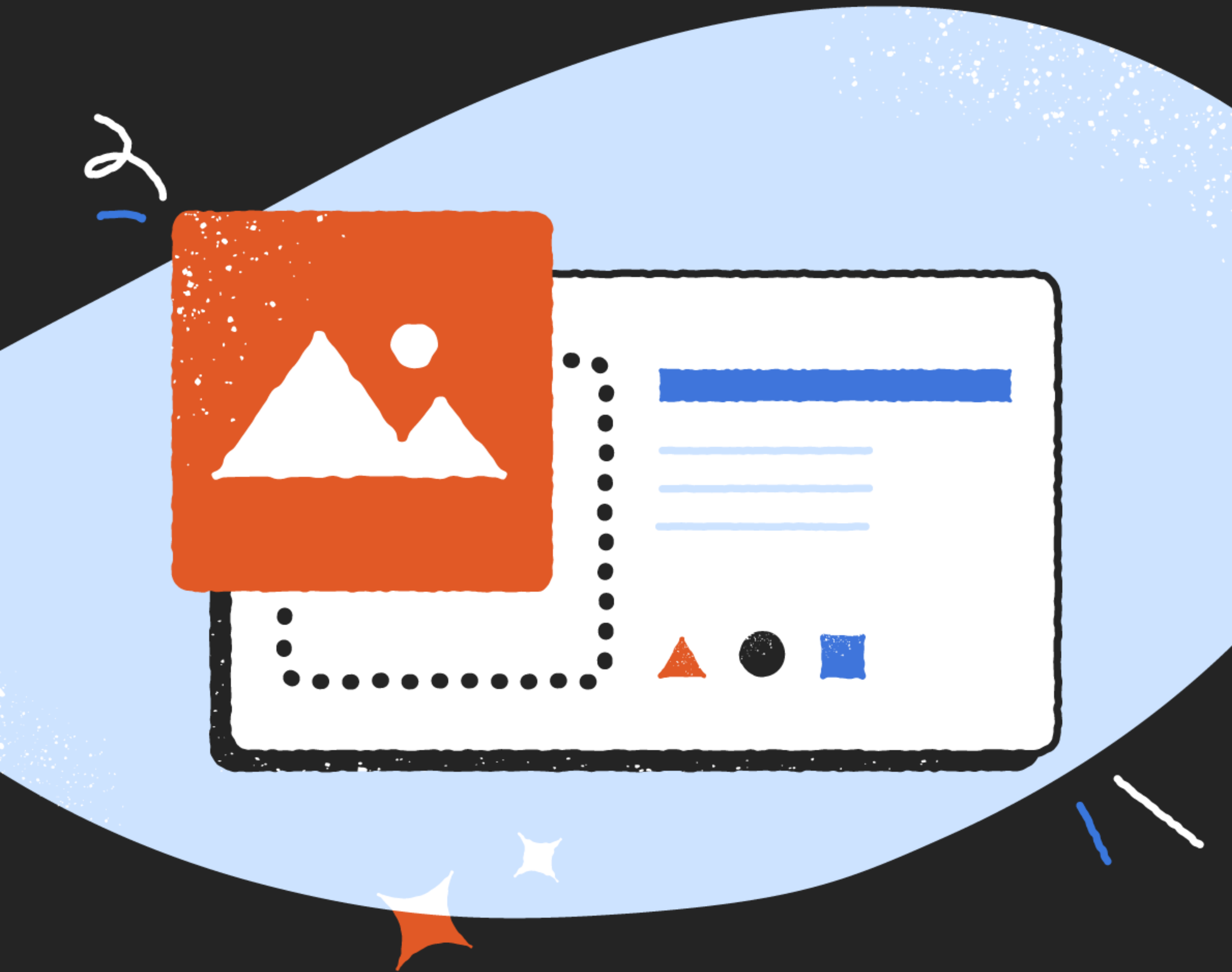
Rinse and repeat. You'll continue working through your slides until you've built out your template. With a standard slide deck and all your data inputs configured, we estimate it should only take you about 5 minutes or less per slide to complete, on the slow side. Make a note of your slides and carve out some time to put together your QBR template.

Once you're done building the QBR template, make a copy of it in your PandaDoc workspace and share it with your team. In order to use it for a specific client, you (or your CSMs) will need to connect it to the client's data.

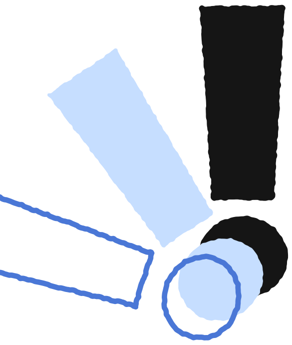
## You're done! Now it's time to test

To ensure confidence in the process, have a couple of CSMs create both the manual slides and the new slides using your QBR template. Compare the data in each to make sure everything looks accurate. If there are any discrepancies, do some troubleshooting by taking a closer look at the variables you assigned to the QBR template. Making sure CSMs feel confident in the data is a key part of the setup — otherwise, you may have this great automated QBR that no one uses.

# Make it official with an announcement and guidelines



Once the QBR template has been verified, it's time to share it with the broader team. Create a copy of the QBR template to store in a central location, and let your team know that's the master copy everyone should be using to create their own. Save a couple of extra copies as a backup — both in case the master gets overwritten, and to use as a test QBR template when you want to change or add new inputs.



# Don't forget to measure the impact of your efforts

With your QBR template in hand, you're off to the races! But let's not forget about another critical piece of the puzzle: measuring the impact of your new QBR process. Remember how we said that the QBR template reduced our prep time per deck by 83%, increased our customer health by 4.4%, and increased account health value by 2%? Well, we only know that because we measured those things before AND after we launched our automated QBRs.

Have your CS team time themselves on their current QBR prep process, look at your current client health metrics, and make a note of how many accounts per CSM you have now. Then evaluate those metrics again, 90 days after you launch.

# Let's get started

Everything you need to start is right here. And if you need help along the way, reach out to your CSM or **PandaDoc Support**. We're happy to answer questions, point you in the right direction, and take your feedback on our automated QBRs.

### Ready for a test drive?

Take advantage of our 14-day free trial to see if PandaDoc's QBR template can help move the needle for your Customer Success team. **Use this link** to go straight to our QBR template.

**Use our QBR template**