

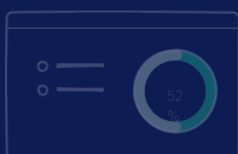
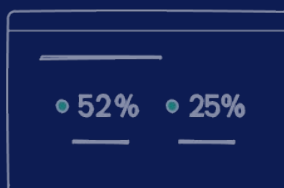
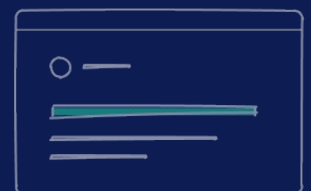
QBR One-Pager Template

Overview

A QBR one-pager is a **brief, at-a-glance, yet data-driven resource** that can be used by customer success teams to summarize key insights from a quarterly business review. In contrast with a full QBR presentation, a one-pager includes **only the most essential insights** and is used to provide high-level updates for customers.

One-pagers should be easily digestible, which means design and hierarchy are crucial. The ideal QBR one-pager should include the data that is most relevant for your customer. For example, based on your customer's goals and objectives, you may decide to **include benchmarking data, ROI insights, usage data, or adoption recommendations**.

This resource includes tips and tricks for creating a QBR one-pager that resonates with customers, as well as a QBR one-pager example from a fictional company called SimpleTicket. This fictional company is a platform that helps customer success teams handle inbound service requests from customers.



How to Create a QBR One-Pager

Use **larger or bold fonts** to highlight key metrics. Implement data visualizations like charts, graphs, and tables.



Donut Chart

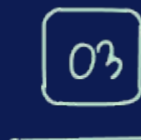


Bar Chart

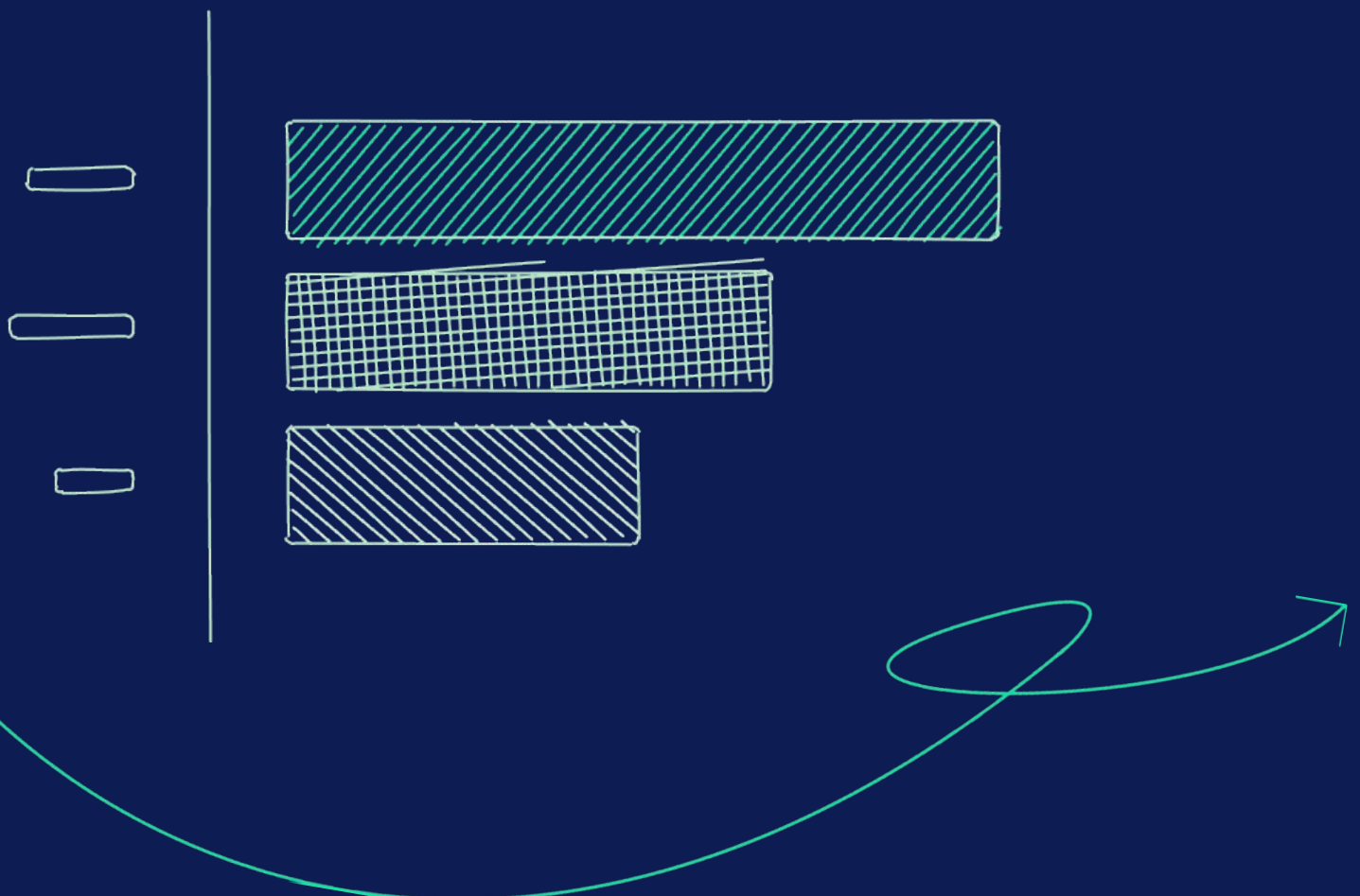


Dual-Axis Chart

Prioritize which information you want your customer to see first, based on which metrics are most impactful or most important to them.



Highlight key metrics to showcase your product's value and build trust. Metrics might include usage details, account information, or ROI insights.



Goal: Focus on the most important highlights from your QBR presentation.

Notes: Make sure to keep the information high-level and not get too into the weeds. While you want to remind the customer key information, you don't want to cram too much detail into a one-pager. Think about who the QBR one-pager is for, and focus on what matters most to them.

Quarterly Business Review



7

Purchased Licenses

Your company currently has a total of 7 licenses purchased.



16

Users Onboarded

80% of provisioned users have gone through the onboarding process.



12

Weekly Active Users

75% of users are using the app on a weekly basis.

Your "phone" channel has the quickest resolution time of **12 minutes per ticket**.

Category chart

12 Minutes

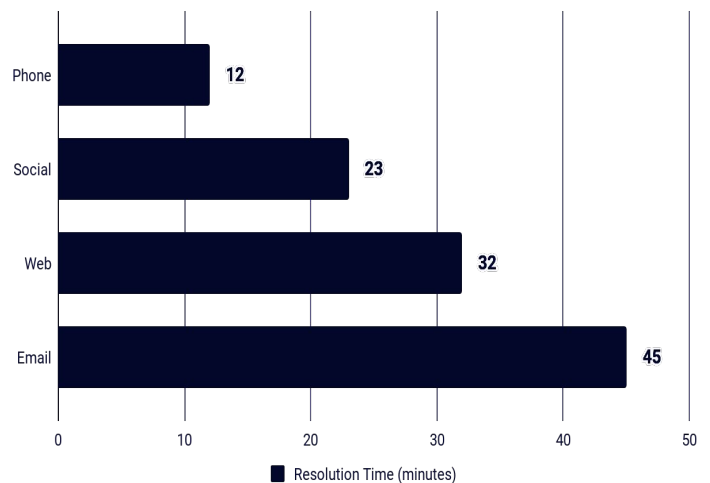
First reply time

10 Interactions

Average number of interactions

70% Score

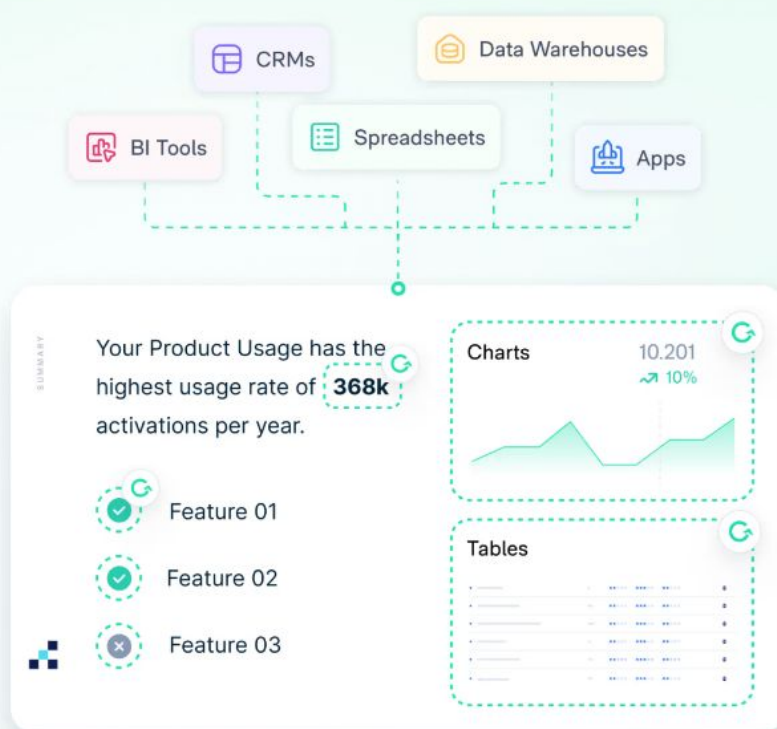
Average satisfaction score



	Current Contract	New Option
Contract type	Professional	Plus
Total number of support agents	30	40
Price per user	\$40	\$40
Monthly contract value	\$1,200	\$1,600
Annual contract value	\$14,400	\$19,200



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less data questions
received by ops

190 hours
saved per week for
analyst team

100%
adoption from global
customer success team

12
business days to
implement

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