

# Mastering SAAS Business Reviews Customer Success Toolkit



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# Agenda

- Introduction
- Zero down // Level Setting
- CS Organization overview
- Importance of business reviews.
- Reality & What goes wrong in a business review
- Mental Model for Business Reviews
- Q&A

What do you think?

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*-Prashant Singh / Churn Control*

# Let's Zero Down and Level Set

## SAAS

Share SAAS Analogy.

## Business Reviews

Regular meetings between you and your clients to discuss the relationship, performance, and future plans.

## Account Segmentation

Global Enterprise

Enterprise

SMB

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B2C

## Challenges

New Use case discovery

Around Accounts \$

Around Product

Around delivery

Getting hold of the sponsor.



# Why Business Reviews are important

*Business Reviews are formal in-person or virtual meetings with the champion, the sponsor and all key stakeholders to*

- Demonstrate current engagement status
  - a. Shared **progress** on agreed/promised/committed value.
- Call out GAPS between current efforts from both side &
  - a. Share actionable **next steps** with timelines and ownership.
- Share best practices, recommendation to multiply value.
- Demonstrate ROI.

# Reality

- **A CSM has 10 to 20 or may be more large or enterprise accounts.**
  - a. CSM writes email to the customer to connect so that they can talk about this.**
  - b. CSM & his manager/director writes separately to the business sponsor to seek his/her time for the business review.**
  - c. At times the sponsor joins and at time he doesn't join.**
- **Some customers are not serious about the business review.**
- **Account management team also needs 10 minutes of time to present during business review.**
- **CSM captures notes, talks about support tickets, escalations and at times the conversation goes unfavorably divergent.**
- **We run out of time.**
- **Next business review not sure, when it will happen.**

# What goes wrong in a business review

- **Poor introductions.**
- **Over friendly or over professional conduct over the call.**
- **No clear objectives or outcomes.**
- **Call control and lack of assurance on the call.**
- **CSM / CSM Manager sounding depleted, repetitive and not adding all stakeholders.**
- **Poor time management.**
- **Missing body language.**
- **Customer is confused about the value received.**



# Some common issues

- **Nothing new to talk about in the business reviews.**
- **We just had a business review in november and now its jan , why do we need to do it again?**
- **Customer has many open issues CSM has still not resolved them, not sure if a business review will be helpful or will invite more trouble.**
- **If I do not conduct business review then I will miss on my KPIs.**

# Portfolio dynamics

- 20-30% of the customer are not serious on business reviews and do not provide a slot to conduct a business review.
- Some customers prefer it to be monthly some prefer for quarterly business reviews.
- Some customer are not responsive at all.
- Very old settled customers, they want to be left alone. Don't want to get bothered.

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- **Missing body language.**

## While creating the deck

### DRIVE

Data-driven insights

Relationship building

Influence and persuasion

Value proposition alignment

Excellence in execution

## While presenting the deck

### SHARE

Success stories

High-level overview

Actionable recommendations

Relationship building

Effective communication

**What does it mean?**

## While Creating Deck

### DRIVE

#### Data-driven insights

Dashboard

#### Relationship building

End user benefit

Champion call out

#### Influence and persuasion

Towards the objective

Indirect and subtle

Remember you are not sales.

#### Value proposition alignment

#### Excellence in execution

## While Presenting Deck

### SHARE

#### Success stories

#### High-level overview

#### Actionable recommendations

#### Relationship building

#### Effective communication



# Preparation is the key

## Pre Work

Get your sides before time.

Dry run the content.

Share the content with cross functional teams ahead of time,

Don't be shy or do things in a SILLO.

Be aligned with ORG Goals

Prepare introduction, for self, your manager, cross functional teams

## During

Story Telling

Story Telling.

The “”USE CASE”” is the HERO.

Delays and lack of collaboration is the Villain.

Customer side champion is your SideKick

## Post Business Review

Executive Summary

MoMs

Agreed steps

Suggested timelines for the upcoming things.  
Create tips

# Post Business Review

<p><b>Outcomes</b></p> <p><b>Achieved / Not Achieved</b></p> <p><b>Customer Input</b></p> <p><b>Feedback:</b></p>	<p><b>Actionable next steps</b></p> <p>New use case discovery</p> <p>Product Adoption</p> <p>Renewals</p>
<p><b>Risks and Opportunities</b></p> <p><b>Risks:</b></p> <p><b>Opportunities:</b></p>	<p><b>CSM Engagement</b></p> <ul style="list-style-type: none"><li>- Next QBR</li><li>- Next Cadence</li><li>- Next updation</li><li>- Timelines</li></ul>



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easy to **cancel**.

*-Prashant Singh*

# Thank you!

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