

QBR Guidebook for Enablement

Use this as a starting point for organizing and creating a successful Revenue QBR.

General Information

- Dates
 - Determine the cadence ie third week of the month
- Format:
 - ☐ Virtual
 - ☐ In-Person
 - ☐ Hybrid
- Teams and Enablement Support:
 - Sales
 - CX
 - CS
 - BDR
 - Marketing
 - P&C
 - Product

Getting Started with planning breakout sessions

If you see the calendar at the end of the document, there are timelines and milestones to help you organize your breakout session smoothly. Let's break it down:

- Start/Set-up conversations with your breakout team to discuss ideas for QBR
 - Set time with your breakout team's leaders to see what they would like to focus on for QBR.
 - If leaders need help brainstorming, here's a few questions to help them get started. You can also add this to the agenda of your meeting
 - What are areas that you think the team is struggling with?
 - What are the team's goals for this coming quarter?
 - Would your team like to have a guest speaker coming in for a presentation? (customer, other employee, etc)
 - Do you want sessions to be interactive, gamified, have presentations from teammates/leaders? What is the ideal format? (this will help you determine where the breakout sessions will take place)
 - Typically, breakout days are 3 hours long with breaks in between. You can determine the best way your breakout team

will work.

- Use **your team's folder** to have your teams collaborate and keep track of all materials. You can share your team's folder with those leaders during the kickoff/brainstorming meeting
- Finalize Breakout Session ideas
 - The sooner this is finalized, the more time you have to get everything together. Have this finalized at least 4-5 weeks in advance.
 - Fill out the items as best as you can in this **QBR session schedule doc**. All you need is a rough outline – you will use the next two weeks to actually put the first draft together.
 - If you need help making an idea into a presentation, please reach out to Janet or Logan.
- Add your Day 2 events to a calendar invite
 - While there is a placeholder on everyone's calendar for QBR, you will need to add your own calendar invite for your breakout session
 - Include where the sessions will be
 - Add in the finalized schedule for the Breakout session
 - For speakers, send them a separate calendar invite for the times they will be presenting.
- Complete first draft of presentation
 - You have 2 weeks to get your first draft in good shape. This focus is mostly on content and organizing those involved in those sessions.
 - If your sessions have a lot of collaboration or need time/information with other teams, make sure you start that process early on.
 - Get a meeting scheduled with your team leaders the Monday or Tuesday after your first draft is completed. This will allow you to get the feedback needed to make changes/initial feedback during final draft week
- Secure any materials you need
 - Logan will help you actually secure the items, but needs a finalized list.
 - Things to consider
 - Do i need office supply items for my activities
 - What equipment do I need? Speakers, Cameras
 - Do I need any additional tech to make this happen? (i.e. jamboard, 3rd party game)
- Complete final draft of presentation
 - You should have a feedback session scheduled for that Monday/Tuesday of final draft week. Use this time to see what needs to be updated/added to your presentation material
 - Use this week to finalize design and flow of the presentation materials.
 - Other things to consider:
 - Is there any prep-work/survey needed from my attendees? If so, get that work together and figure out when

you will send it to your attendees

- Walkthrough week
 - Schedule time with your leaders/speakers to see walkthrough the presentation
 - Things to consider:
 - Is the timing of each session still good? Do i need to make them longer/shorter based on the walkthroughs
 - Is the technology working the way it should? Do I need IT's help to get everything situated?
 - This is your time to make sure everyone feels confident in the presentation and speaking pieces. You should be finished and ready for QBR by EOW

What's next in this guidebook:

- Walkthrough of QBR
- Post-QBR checklist
- QBR Schedule Template

December 2022

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
11	12	13	14	15	16	17
	Start/Set up conversations with Respective teams to discuss ideas for QBR.					
18	19	20	21	22	23	24
	Start/Set up conversations with Respective teams to discuss ideas for QBR.					

January 2023

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
1	2	3	4	5	6	7
				Finalize QBR Breakout Sessions ideas with Team		
8	9	10	11	12	13	14
			Send out Day 2 Agenda invite			
15	16	17	18	19	20	21
				Secure any materials you may need for your presentation	Complete first draft of presentations	
22	23	24	25	26	27	28
	Suggested day for First draft review.				Complete final draft of presentations	

29	30	31				
Walkthrough Week! Work with your presenters to work out any kinks and finalize any changes needed						

Feb 2023

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
			1	2	3	4
			Walkthrough Week! Work with your presenters to work out any kinks and finalize any changes needed			
5	6	7	8	9	10	11
		QBR!! 2.7-2.8				