

Executive Summary

Quarterly Highlights

- Highlight/win
- Highlight/win
- Highlight/win

Impact

Examples:

Drove \$X in incremental value

X number of [key action - campaigns, projects, workflows, ect.]

What's Next

- New recommendation
- New recommendation

Strategy and Goals

Business Goals or Challenges to Address	Defining Success
Goal #1	KPI
Goal #2	KPI
Goal #3	KPI

Quarter Review: Goal 1

Outcomes this Quarter:

- Key milestones
- What went well?
- What could've gone better?

Impact:

- KPI 1
- KPI 2
- KPI 3

Partnership Check-in

1. How would you describe your [product] experience so far?
2. What's driving the most impact for you as a [product] customer?
3. What would you like to see us add or change in the partnership moving forward?

Looking Ahead

1. Recommendation #1
2. Recommendation #2
3. Recommendation #3

Examples: New use cases to implement, features to activate, etc.

Proposed Action Items

- Action Item 1
 - Responsible Party
 - Deadline / Time frame
- Action Item 2
 - Responsible Party
 - Deadline / Time frame
- Action Item 3
 - Responsible Party
 - Deadline / Time frame