

OPSPLY — REVOPS TOOLKIT

QBR Deck Template

A complete Quarterly Business Review framework — fill in the data, present with confidence. Covers pipeline, wins/losses, forecast, and asks.

12

Slide Templates

Quarterly

Review Cadence

60 min

Meeting Format

QBR Agenda & Time Budget

A well-run QBR is 60 minutes of focused data, not a 2-hour slide deck marathon. Use this time budget as your guide — adapt the slide prompts below and present what actually matters to your audience (leadership, the full sales team, or a single account).

Section	Slides	Time
1. Executive Summary	1–2	5 min
2. Last Quarter Performance vs. Plan	3–4	10 min
3. Pipeline Review	5–6	10 min
4. Wins & Losses Analysis	7–8	10 min
5. Next Quarter Forecast & Plan	9–10	15 min
6. Asks & Blockers	11–12	10 min

Executive Summary

REVENUE (Q VS
PLAN)

\$

QUOTA ATTAINMENT

%

NEW LOGOS

#

PIPELINE COVERAGE

X

3 KEY MESSAGES FOR LEADERSHIP

1. The Headline Win:

2. The Key Challenge:

3. The Top Ask:

Last Quarter Performance vs. Plan

Revenue Summary

Target

\$_____

Actual

\$_____

vs. Prior Q

_____%

vs. Plan

_____%

Rep Attainment

Rep	Territory	Quota	Closed Won	Attainment %	New Logos	Biggest Win
		\$	\$	%		
		\$	\$	%		
		\$	\$	%		
		\$	\$	%		
TEAM		\$	\$	%		

Pipeline Review

Pipeline by Stage						
Stage	Close Probability	# Deals	Total ACV (\$)	Weighted (\$)	Avg Deal Size	Avg Days in Stage
Discovery	10%		\$	\$	\$	
Qualified	25%		\$	\$	\$	
Demo / Eval	40%		\$	\$	\$	
Proposal Sent	60%		\$	\$	\$	
Negotiation	80%		\$	\$	\$	
TOTAL PIPELINE			\$	\$		

Pipeline Coverage Ratio

X

(Target: 3-4x quota)

Deals Stalled 30+ Days

Need immediate action

At-Risk Deals

Competitive / no champion

Wins & Losses Analysis



Top 3 Wins This Quarter

Win 1 — Account / ACV

Why We Won

What to Replicate

Win 2 — Account / ACV

Why We Won

What to Replicate

Win 3 — Account / ACV

Why We Won



Top 3 Losses — What We're Learning

Loss 1 — Account / Lost ACV

Lost To / Root Cause

Corrective Action

Loss 2 — Account / Lost ACV

Lost To / Root Cause

Corrective Action

Loss 3 — Account / Lost ACV

Lost To / Root Cause

Next Quarter Forecast & Plan

Conservative Case

\$

High-confidence deals only

Base Forecast

\$

Most likely outcome

Upside Case

\$

If key deals break our way

NEXT QUARTER PRIORITIES

Top 3 Must-Win Deals

Key Initiatives to Drive Pipeline

Asks & Blockers

This is where the meeting pays off. Be specific. Each ask needs an owner and a deadline.

Asks from Leadership				
Ask / Request	Why It Matters	Owner	Deadline	Status

 Active Blockers				
Blocker	Affected Deal(s)	Root Cause	Resolution Path	Owner



QBR ready. Meeting set.

Pair with the Opsply Sales Forecasting Model and Sales Territory Planning Workbook for a complete RevOps stack.

opsply.com