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Reframing Internal QBRs

Strategies to Align & Connect Your Sales Team

Often thought of as just offsites for director level and above, QBRs provide execs with the opportunity to review results of a past quarter, discuss current challenges and opportunities and align the team. But what about the team members that are working out in the field?

QBRs are relevant for the entire team, and virtual QBRs give the opportunity for everyone to be included.

A few benefits of virtual QBRs:
- Accessibility for broader team to engage with colleagues in other locations
- Inclusive workplaces for those who are unable to travel
- Real-time information sharing
- Increased productivity, visibility and efficiency

QBRs, virtual or in-person, come with a set of challenges. By reframing the QBR, these critical meetings can help teams progress and adapt.

This short guide dives into:
- Common pitfalls of QBR formats
- Strategies to reframe the QBR
- How Filo can help facilitate virtual QBRs

Deal Room 1

Deal Room 2

Join Room
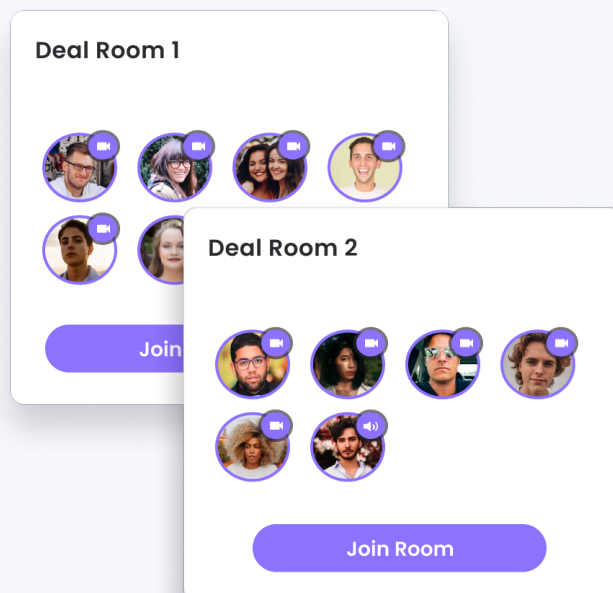
Common Pitfalls of QBRs

While QBRs are a great opportunity to align teams, they also can come with certain pitfalls or challenges.

Inconsistent Formats

Not having a framework means that each team has its process and style for the meetings. While leaders can certainly have their preferences and styles, inconsistent execution makes reporting results to the larger team challenging.

Roll-Up Reporting

For some orgs, QBRs serve the purpose of reporting upward to management instead of holding purposeful conversations with actionable steps. With this format, the process typically spans multiple weeks and becomes more exhausting than helpful.

Only Retrospective

In these QBR styles, teams look back at the previous quarter, present outcomes and leave it there. There is little to no forecasting or planning for progress throughout the quarter and beyond.

Reframing QBRs

A QBR needs to be meaningful and should provide a holistic view of the health of the revenue teams.

To ensure your next QBR is a gamechanger, and not just a verbal report card, consider these 4 strategies.

Develop consistent best practices across teams

The QBR should be a place for the team to collaborate and solve problems. Creating a standard approach will benefit execs and team members. However, it should not be incredibly process intensive.

A few things that need to be identified:
- Key things you would like discussed and reviewed
- Delivery format
- Timing of breakout sessions

No one wants to sit in a Zoom for hours, simply listening to someone speak. **Consider having each presentation range between 30 minutes to one hour, giving enough time for collaboration.**

Focus on engagement throughout

Holding a virtual QBR has ample opportunities for engagement before, during and after.
- **Pre-QBR:** A way to engage the team early on is by deploying a survey to gain feedback on the desired QBR format or to pose questions to speakers and execs.
- **During QBR:** The content delivered can be a mix of business presentations and social elements. Utilizing a virtual meeting platform gives different areas for presentations and fun gatherings like happy hours.
- **Post-QBR:** It's best to map out the next steps for the upcoming quarter. By having all assets (i.e. notes and decks) in one location, people can keep the conversation going—a great way to keep everyone involved.

Blend content that helps progress

QBR discussions should shift towards strategizing on ways to enable the team to progress or adapt after reviewing the past. **Consider blending the best of an internal QBR with a kickoff event.** Kickoffs are significant events to align the team as well as give an avenue for team building.

Think about deploying these kickoff strategies in your QBRs:

- **Peer-led sessions:** Peer-led sessions allow for interaction, real-world applicability and connection. These sessions also allow for your team to tackle issues together and spotlight those that are excelling in their roles.

- **Team alignment:** Teams can review their quarter's performance or align on their own goals for the quarter to come. Executives can jump into these tighter group conversations and deep dive into what matters with that particular team or participate in a more personal way.

- **Essential education:** Preparing your team with tactical skills, product knowledge, and know-how is the way to success. Deploy hands-on practice or discussion; this is also an excellent opportunity to build cross-functional collaboration by bringing specific roles (i.e. AEs, SDRs, BDRs, Sales Engineers, etc.) together for education or certification.

Identify core groups

Finally, consider the segmentation of the teams. Which groups execute out in the field or inside the organization?

There are several ways the core group can be segmented:

- **Specific teams:** An example of this group would be individual sales teams, including the sales reps with a manager and a cross-functional support system. These segments start with a group of 8 to 10 members, expanding anywhere between 20 to 30 members once all cross-functional roles are added.

- **Functional groups:** It's common to split groups around finance and marketing or operations and sales. This route allows the teams to capture their processes and room for improvement to help themselves and the broader group.

Each group should have breakout sessions during the QBR. If the teams are also broken up based on regions, they can get together across functions to talk about how tactics have applied to their region and the challenges they must overcome.

Challenge Accepted

Filo Can Help Facilitate Virtual QBRs

Filo is a collaborative platform for internal events, training and workshops. We're also a company of really great (and smart) people here to help you. Here are a few ways we help facilitate internal QBRs.

Branded and organized virtual campus

Filo enables you to create a streamlined, branded and centralized campus for QBRs with:

- Easy access to meeting links – no more looking for links
- Embeddable decks, agendas, notes via Google Workspace docs using Filo Tiles
- Virtual Rooms to streamline breakout sessions
- Spaces for each functional team to create, converse and solve problems
- Unique Roles to distinguish permission and access
- Persistent Chat to immortalize conversations
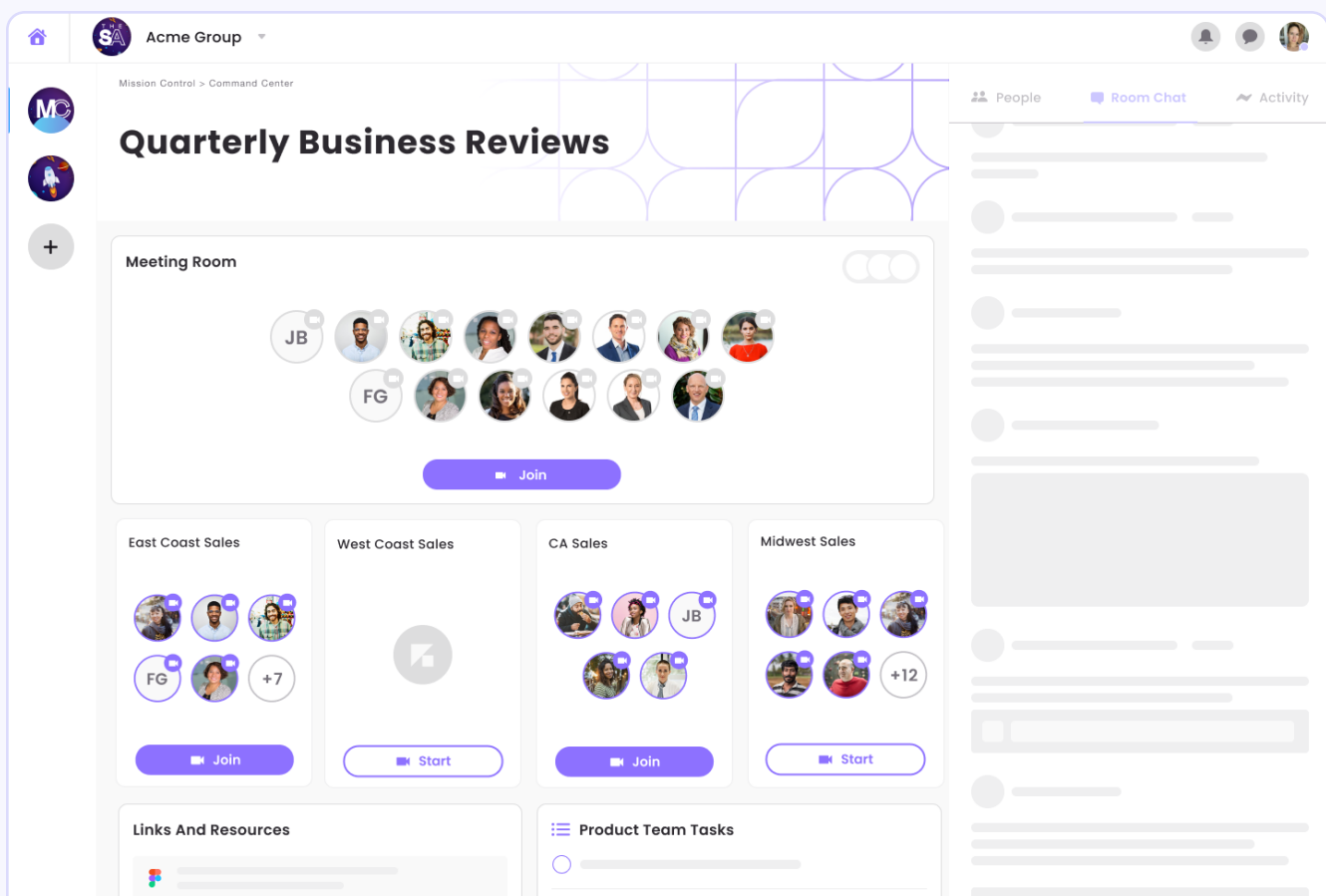
Visibility during synchronous meetings

Filo allows participants to see where everyone is in real-time as if they were together in person. Due to Filo's visibility, the meeting is upleveled by facilitating smooth transitions between breakout rooms, conversations and topics.

Facilitate cross-functional collaboration

Companies can create persistent rooms for teams, projects or topics for a virtual QBR. The QBR planner should create these rooms to build consistency across all teams. However, consider giving team leads and managers access to add a few components that relate specifically to their team, like scorecards and icebreaker activities.

You can create a space to bring in the Product team to discuss product launches and the Product Marketing team to discuss new strategies. Having these breakouts geared towards specific topics allows everyone to focus and weigh in on the strategies for the upcoming quarter.

Provide unforgettable ways to engage

There are many ways to collaborate with your team in Filo. Choose from 30+ integrations from whiteboards (Miro), docs and slides (Google Workspace) to playlists (Spotify) to engage the entire team. Interact with the broader team using polls with Slido to show real-time results and get quick feedback.

Filo is also equipped with a chat functionality to take engagement one step further. Have team leads pose questions at different times to foster conversations.

CASE STUDY

Yext facilitated rapid peer-led learning sessions during their virtual SKO with Virtual Deal Rooms.

An RVP would lead a short session on a key deal, and attendees could choose which deal to learn about and hop in. Read more about Yext's Deal Rooms at https://hubs.ly/ H0Sb5QK0.

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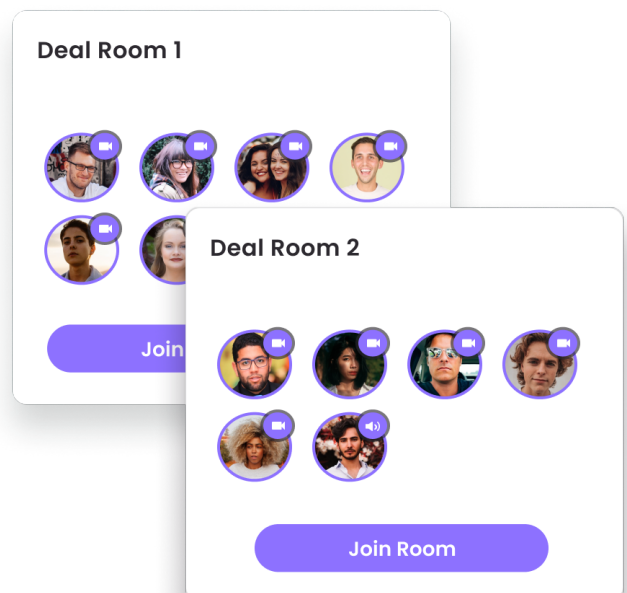
From QBRs to onboardings, kickoffs, and deal reviews, Filo brings distributed revenue teams together.

📉 Reduce Ramp times

🌟 Streamline Workshops & Trainings

🙌 Boost Energy with Meaningful Collaboration

🤝 Close Deals Faster

Request a Demo