How you can get the most out of your IT, through strategic meetings on a quarterly basis

Being in business and interacting with a diverse set of clients over 20 years, has given us plenty of opportunity to learn what drives client satisfaction. Some preferences are a matter of taste, but ongoing improvement, clear communication, transparency, and accountability are always in style.

We'd like to share one secret trick we build into our process to ensure optimal outcomes. It's something not every company in the industry does — but after implementing it at Keeran, we couldn't imagine going without it.

The frustration of business owners with their IT providers typically boil down to a couple of different things. Any of these familiar to you?

- They aren't sure whether their technology is running as best as it can, or whether the issues they see are something that could and should be fixed.

- New technologies may get put in place, but they never get explained. With IT they don't understand they can't use it to deliver a return on their investment.

- Providers surprise them with large expensive projects with no fair warning or time to prepare a budget for addressing the issues.

- They get buried under technical documents that all PROVE how good a job the IT company is doing, but that don't provide any real insight about their own business.

- IT gets treated like a mystical art that they're supposed to just accept any given answer about without understanding why.

- Unexpected updates and maintenance are set at the best times for the IT company without care to the disruption it causes their own business.

When one, or a few of these items start popping up business owners start worrying, and IT providers know that their clients satisfaction is likely at risk. So how to avoid getting to that point, if it's bad for both parties?

The Secret Weapon: A Quarterly Business Review

We haven't always done this, but the key to our work now is a holding ourselves to a rigorous Quarterly Business Review (QBR) schedule with every client. Giving an opportunity for a face-to-face meeting (in person or digitally) every three months ensures the client has a space to discuss their IT at a strategic level, not just ticket by ticket. It also provides the chance for us learn from them what's working best and where they're hoping to get to in the coming months.

Having these meetings has been so fruitful we now consider it a core part of our company culture. We break down the obfuscating wall between business and IT provider and endeavour to bring transparency and results to the table. It means we're able to align our goals with the clients and share news on the gains we've made — not to mention, it keeps us on our toes to always be searching for improvements!

You can have all the data in the world to show how a business is thriving — but it's not the same as hearing that genuine satisfaction in a client's voice. And when you're talking directly to the business owner, you're avoiding all that middleman noise and misunderstanding that can get in the way of enacting a seamless business-IT strategy. So, what's this QBR all about? How does it address what businesses need from their IT providers?

Keeran's QBR Process: Seven Steps for Success

We've developed our QBR process based on years of practical experience working with clients of various sizes, industries and needs. It's specifically constructed to promote accountability, results, and client satisfaction.

The length of our QBRs is customized to fit each business and their goals. For most, that works out to between 60 and 90 minutes. This provides time for us to briefly share historical results and invite feedback before launching into a discussion of the future. It's short, it's effective and it turns a jumble of data into a clear picture of how you get an ROI.

Here's What You Can Expect

1. All our QBRs start with a detailed update for the client. This is where we introduce any planned service improvements, new operating procedures, services, or personnel. We'll also share our own important wins with the client, so they're aware of our internal status and how it might benefit them.

2. We'll invite the client to update us on their own business. Questions like, "what's happening at your site?" or about anticipated growth, new funding, or budget cutbacks informs us and empowers us to provide recommendations that match with their corporate goals.

3. Our QBR approach is more strategic than operational, but we will take a moment to run a light review of service successes or lapses from the last quarter.

4. More important are last quarter's goals. This could be anything from updating critical software packages to assisting in creating policies for the use of their IT. We'll revisit and review what was set last time, and if something wasn't accomplished, here's our chance to promote some accountability. Depending on the reason for the miss we'll work together to determine whether the goal should be pursued anew, revised, or dropped entirely.

5. Of course there's no such thing as being through getting better. We need to set goals for the next quarter! We'll collaborate on strategic goals, establish and document who's responsible and the identify what steps the goals require. These items will also be prioritized to encourage success. These goals typically arise from four sources:

- Client satisfaction surveys

- Response to specific service issues

- Our own new initiatives brought forward by our Innovation Committee

- Client initiatives.

6. We always give our clients a chance to discuss new strategically important hardware or software they may wish to deploy.

7. Last, we open up the floor. We encourage our clients to have an open discussion on how we're doing and how the meeting's helped them achieve their goals. It's a less structured, more casual conversation that allows us to glean insight to better understand overall client satisfaction with the service. With these steps followed, we find we're able to understand how we're succeeding together, and where we stand to gain even more from continuous improvement.

Why You Deserve a QBR

Quarterly business reviews stop leadership from getting only a fragmented understanding of their IT. When managers and business owners are given these opportunities for review, they leave better prepared to understand how their IT decisions can drive their ROI. Why every quarter, rather than monthly or biannually? In our experience, it's the most balanced and strategic way that we can align with a client's management's roadmap. Many events happen during the span of a quarter, so these quarterly meetings provide a chance for management to shape their organization in response without scrambling to set aside time too frequently. That being said, every business is different, and we're flexible to match. In general, quarterly is best practice, but some of our accounts prefer every two months, others every six months. The important thing is to set the plan intentionally and stick to it.

Believe us: without meetings like these, IT providers can only provide best guesses, not answers. To truly demonstrate our value we must be pointed in the same direction as the rest of your organization. For calibrating that direction there's nothing better than some face-to-face time between the leadership teams.

Not Just Customer Service, but Customer Success

Like we said earlier, some IT providers replace personal touch with reams of data. The data may well be both correct and positive, but if it's in a format that is incomprehensible how can you benefit? Highlighting what's actually relevant, explaining how to interpret it, and determining what's actionable should be the task of the IT professionals, not yourselves. A doctor doesn't hand you all the charts from the tests they run and then ask you what you'd like to do about it.

It is our job to empower our clients to be more strategic with their business and IT planning, and that's what the QBR process is all about: helping a client understand how to apply technology to their business processes. Bringing personalized solutions to the fore and moving beyond reactive customer service responses is our goal. It is a goal that can only be achieved through tight coordination and a focus on proactive planning. A client's success is the best measure of whether we achieved that or not, no matter what any other report may show.

What is Your Relationship with IT?

Getting in the position to make the most of a QBR can sometimes take a fairly major mental shift. Many organizations have grown up IT dependent, considering it a necessary evil, and a cost center that they want to reduce to as low as possible. When they get together with their IT company they just want to know about each individual issue and how it can get done faster next time, because that's all they really feel in control of. As technology gets more tightly integrated into all facets of business though, it's becoming and outdated way of looking at things.

Technology needs to be considered a strategic asset that can help set you apart from your competitors. You could be using it to deliver product faster, communicate with your clients more easily, or to connect with a national, even international talent pool. What is going to deliver the biggest impact is completely unique to each organization which is why it's so vital that your IT provider is a part of the conversation. Otherwise you may spend all of your budget on improvements that look interesting, but ultimately don't move the needle.

A transition between these viewpoints rarely takes place overnight, so don't get discouraged if it seems a bit daunting at first. Many of our clients have taken a long road to get there, but we've been there quarter after quarter delivering results that show them that they are on the right track.

QBRs are key here for keeping up forward momentum and identifying where our expertise can help clear any new challenges. As companies see success and grow their needs often change, and companies rely on our experience to help them with that transition. Our clients range from small 5 person teams to 150 person, multi-location operations, and a little bit of everything in between. That background means we're ready to support your next steps, and can make recommendations on what we know already works for other businesses like yours.

Our Evolving QBR Approach

The way we conduct our QBRs has always been a dynamic, ever-evolving work-in-progress. During our 22 years working with amazing clients, founders, and IT managers, we've refined and redefined our process based on the results we've observed. The more casual approach we started with was not useful — not for us, in terms of helping our clients, and especially not for our clients who couldn't understand what we wanted from them.

That's why we built that seven-step structure. We've learned from our missteps, removed anything irrelevant or unhelpful, and distilled our absolute best approaches into a standardized set of practices. Leveraging that past experience has allowed us to bring greater benefit to our clients. At this point, it's a lean, effective, results-oriented tool that we see succeed again and again.

Ready to experience the difference your business can feel when an IT provider takes your success seriously?

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