



Suhas Bhairav

AI Customer Quarterly Business Review QBR Deck Plan

**Automate ROI data and generate clean,
executive-ready QBR decks.**

Turn customer outcomes data into an automated,
presentation-ready QBR that accelerates decisions.

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What to Automate in CS QBRs

Define target ROI metrics and standardize the data feed. Automations should cover data collection, calculation, and deck assembly to ensure consistency.

Key move Start with a single product line to prove ROI before scaling CS-wide.

PRACTICAL CHECKLIST

- 01** Automate ROI calculations from renewal value, expansion ARR, and cost-to-serve data.
- 02** Create a standard KPI set: Net Revenue Retention, expansion rate, CSAT/NPS, time-to-resolution.
- 03** Automate data ingestion from CRM, helpdesk, usage analytics, billing, and product telemetry.
- 04** Define data owners and refresh cadence (daily/weekly) to keep decks current.
- 05** Flag data needing human review (exceptions, forecasts, or questionable sources).
- 06** Auto-generate draft slides with notes and executive summaries.
- 07** Generate variance analyses comparing plan vs actuals with trend visuals.

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Data, Tools & Roles

Outline required data sources, tooling, and ownership. Clarify who reviews AI outputs and who approves final decks.

Key move Appoint a CS data owner to own the pipeline and quarterly audits.

PRACTICAL CHECKLIST

- 01** Data sources: CRM ARR, renewal dates, usage metrics, helpdesk tickets, NPS, CSAT, and billing.
- 02** Data freshness: set daily extractions and weekly reconciliations to keep numbers reliable.
- 03** Tools: your AI assistant (ChatGPT/Claude), BI dashboards, and automation scripts.
- 04** Data quality gates: deduplicate, normalize currencies, handle missing values, and flag anomalies.
- 05** Automation boundaries: AI handles calculations and drafting; humans review interpretations and strategic recommendations.
- 06** Access controls: role-based access to data sources, dashboards, and AI outputs.

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Adoption Plan, Governance & Metrics

Lay out weekly adoption steps, guardrails, approvals, and how to measure success. Define ownership for each artifact and review cadence.

Key move Approve the first deck cycle with a senior CS leader before broader rollout.

PRACTICAL CHECKLIST

- 01** Week 1: connect data sources, test reconciliation, and generate a pilot deck.
- 02** Week 2: assign owners, establish review rituals, and embed guardrails.
- 03** Week 3: run a dry QBR with internal stakeholders and capture feedback.
- 04** Week 4: publish first AI-assisted deck to leadership with notes.
- 05** Establish metrics: time-to-deck, data accuracy, and decision speed improvements.
- 06** Governance: require human sign-off for strategic recommendations and forecast assumptions.
- 07** Security/compliance: preserve data privacy, limit exports, and audit access logs.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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