A FUSED POSITION BRIEF

Kill the *report card.*

Why customers don't value your quarterly business review, and the forward advisor conversation to conduct instead.

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PREPARED FOR
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What's inside.

The standard business review fails in three ways, two design flaws and one *trust event* most suppliers never notice happening. Here's each one, and the forward advisor conversation to run in its place.

YOU'VE BEEN IN THAT ROOM

Slide 23 says the partnership is healthy. The customer stopped listening at *slide 4.*

Somewhere today, an account manager is walking a customer through slide 23 of a quarterly business review, and the customer stopped listening at slide 4. Meanwhile slide 23 says the partnership is healthy. With a smiley face.

▶ THIS ISN'T ABOUT LAZY ACCOUNT TEAMS

If you sell, you've been in that room. If you buy, you've been bored to tears. Nobody needs a survey to recognize it.

The people running these reviews prepare hard. They care about the account. They follow the format they were handed. The format is the problem. It was built to *report*, and reporting is not what the customer came for.

▶ THE CLAIM WE STAND BEHIND

The review is a conversation, not a report. Run it as a report and you burn the best hour you get.

THE STANDARD REVIEW FAILS IN THREE WAYS

01

Rear-view mirror

DESIGN FLAW

It walks through last quarter, all stuff the customer already lived through and knows.

02

Speaks in ratios

DESIGN FLAW

Percentages are how suppliers talk. Nobody ever called an emergency meeting over a ratio.

03

Numbers they don't believe

A TRUST EVENT

The quiet one, the one most suppliers never notice happening, and the one that ends meetings.

FLAW ONE, IT MOSTLY LOOKS IN THE REAR-VIEW MIRROR

That's not a review. That's a dashboard *read out loud.*

The standard review walks through last quarter. Volumes. Tickets. Service levels. Compliance. All true, and all stuff the customer already knows, because they lived it.

THE HARDEST HOUR IN B2B TO GET

An hour with a real decision maker might be the hardest thing in B2B to get. A meeting that tells people what they already know asks for that hour and gives nothing back. So the meeting gets delegated. Then shortened. Then skipped. You've watched it happen.

WHAT EARNS THE HOUR

The other direction. What's coming at the customer's business in the next two quarters, tied to their numbers. The regulation moving through their category. The shift two segments over. What it's all worth to them, in dollars.

80% SENSE-MAKERS vs *30%* INFO-GIVERS

GARTNER · 1,000+ B2B BUYERS

Sellers who help the customer make sense of information close high-quality, low-regret deals **80 percent** of the time. Sellers who just hand over more of it: **30 percent.**

Same customer. Same hour. The difference is which way the conversation faces.

FLAW TWO, IT SPEAKS IN RATIOS

Two sellers walk into business reviews. Only one *changes the agenda.*

SELLER ONE — A ratio

82%

"You're at 82 percent compliance."

GETS A NOD · PAGE TURNS

SELLER TWO — Two dollar figures

PAID YOU LAST YEAR
$412K

LEFT ON THE TABLE
$90K

"This program paid you $412,000 last year. There's $90,000 still sitting on the table."

LEANS IN · THE HOUR IS THEIRS NOW

DOLLARS ARE HOW CUSTOMERS THINK

An 18 percent gap is an abstraction. $90,000 is a number somebody brings up in the next budget meeting, and a missed dollar stings more than an earned dollar feels good.

TWO DETAILS THAT MATTER

Keep the earned money and the missed money as two separate numbers, the pair hits harder than any blended percentage. And say the missed money out loud: *left on the table* means invisible until somebody names it.

> **Lead with dollars. Ratios go in the appendix.** Which raises the obvious objection: whose dollars? That's Flaw three.

FLAW THREE, NUMBERS THE CUSTOMER DOESN'T BELIEVE

This is the quiet one. It's also the one that *ends meetings.*

Most review decks get built from deep inside the supplier's own weeds. Your systems. Your program math. Your version of their business. The customer keeps their own books, and the two versions may not match perfectly.

THREE FIELD EXPERTS, THREE DIFFERENT ROOMS

Somewhere in the deck sits a number the customer doesn't recognize as theirs. They point at the screen. "That is not my number." Meeting's over, at least in their mind. Everything after that gets presented to folded arms.

▶ WHAT HAPPENS IN THE CUSTOMER'S HEAD

Not "they made a mistake." More like *"what else is wrong in here."* A disputed number doesn't read as a typo. It reads as a reason to re-check everything else you've ever shown them. It's a trust event, and trust events outlive the meeting.

▶ THE FIX IS BORING, WHICH IS WHY FEW DO IT

Build the review from numbers the customer already agreed to. Before the meeting, not during it. Their quantities. Their volumes. Then read the numbers together, instead of grading them with the deck.

Report cards get disputed. Shared numbers get discussed.

WHAT TO RUN INSTEAD, THE FORWARD ADVISOR CONVERSATION

Not a bigger deck. A different *design.* Six moves.

1 Lead with where the business is going.

Open on what's coming at the customer in the next two quarters, tied to their specific numbers. The regulation, the market shift, the category economics. The read they rarely have the time or the sources to build, and the one thing a competitor can't easily copy.

2 Growth before risk.

Upside first, threats second. Open on compliance and you're an auditor grading the past. Open on where the growth sits and you're a partner planning the future. Same deck, different meeting.

3 Dollars, not ratios.

Every metric becomes what the program paid them and what's still on the table, two separate numbers. Percentages go in the appendix for whoever wants them.

4 Anchor on numbers they trust.

Build from the customer's own quantities and figures agreed before the meeting. Never lead with a cost line the customer can dispute. Read the numbers together.

5 End on a gut-check.

Close with the one reframe that changes how they run their business after you leave. Our favorite from the field: *revenue is not profit.* One chart, shown two ways, overleaf.

6 Build it once, so anyone can run it.

The best review we ever found was ugly, hand-built by a veteran, formatting only a mother could love, and it worked. Most companies would ask him to present at the kickoff. We encoded him instead: his review became a repeatable conversation in three beats, where you stand, what the program pays you, what's still on the table. Swap the data per customer. One veteran, encoded, beats ten binders of best practices.

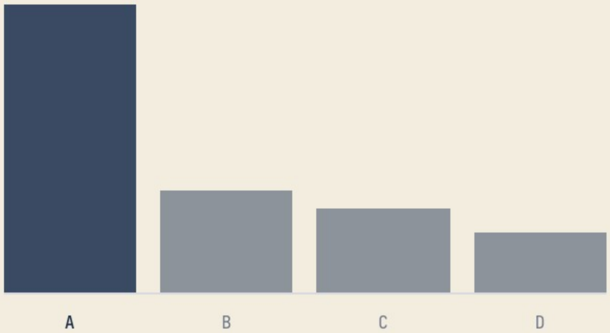
THE GUT-CHECK, REVENUE IS NOT PROFIT

One chart, shown two ways, worth more than the other *22 slides.*

In one review we rebuilt, a single chart made the point. First view, purchasing: one product category towered over everything, their biggest line, their pride. Same chart, flipped to margin: the tower nearly vanished.

VIEW ONE · BY REVENUE

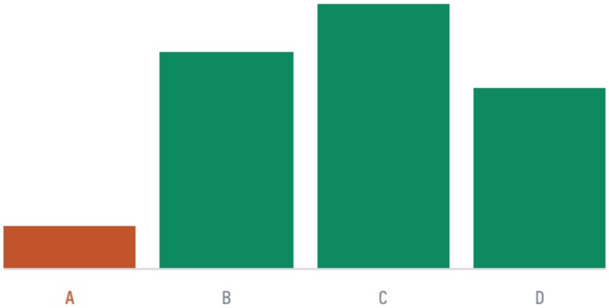
What purchasing sees



Category **A** towers. Their biggest line. Their pride.

VIEW TWO · BY MARGIN

What actually earns



Category **A** nearly vanishes, one of their thinnest earners.

They'd been reading revenue as profit for years, and their own reports never made them look. That one flip was worth more than the other 22 slides put together.

THE MOVE

Close with the one reframe that changes how they run their business after you leave, a truth their own reporting never made them see.

Their biggest line was one of their thinnest earners, and they'd never once been made to look.

THE REVIEW IS A CONVERSATION

Deals are won or lost in the conversation. It hasn't *improved.*

Sellers have more data than ever and the conversation hasn't improved. The business review is where those two facts collide once a quarter, on the calendar, with the customer already in the room.

THE RESCUE PARADOX

Watch what happens when those hours get wasted. A big account wobbles at renewal and suddenly there's time, all-hands reviews, execs on planes, discounting at 9pm. Everybody finds time for the rescue. Nobody found time for the four quarterly hours that would have prevented it.

RUN AS A REPORT CARD

It burns the best recurring hour in the relationship, telling people what they already know, in a language they don't feel, on numbers they may not believe.

RUN AS A FORWARD ADVISOR CONVERSATION

It's the one meeting where the customer learns something about their own business, in dollars, from numbers both sides trust, and leaves with a reason to stay and grow.

> The customer already decided which of those meetings deserves a decision maker in the room. The suppliers who redesign the conversation first will be sitting across from the executives their competitors lost at slide 23.

ABOUT FUSED

Redesign the one hour the customer already gave you.

Fused works with commercial organizations to turn the quarterly business review from a report card into a forward advisor conversation, built from numbers both sides trust, and encoded so any seller on the team can run it.

It starts with one review you already have on the calendar. *Rebuild it around dollars and the road ahead, and watch which way the customer leans.*

The one study cited is Gartner's research on more than 1,000 B2B buyers. The dollar figures in the worked examples are illustrative. The rest is what we've seen in the field.

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