

# QUARTERLY BUSINESS REVIEW

Q3 Strategic Planning & Performance

Fiscal Year: 2024  
Account Lead: Alex Sterling

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<b>Key Date</b>	<b>Milestone / Deliverable</b>	<b>Stakeholder Owner</b>
July 12	Data Consolidation & KPI Audit	Analytics Team
August 15	Draft Executive Summary Review	Operations Director
September 15	QBR Presentation Deck Finalized	Account Executive
September 28	Q3 Business Review Meeting	Executive Board

#### **STRATEGIC FOCUS**

Scaling automated reporting workflows and reducing customer churn by 4% through targeted retention campaigns.

#### **SUCCESS METRICS**

CLV increase, Net Promoter Score (NPS) > 75, and operational overhead reduction of 12%.