

The Slide-by-Slide EBR Breakdown

Episode 12 Companion Download

Your executive business review deck should tell a story, not dump data. This companion guide breaks down the six essential slides that drive real business conversations and actionable outcomes.

SLIDE 1: Strategic Alignment Recap

Purpose: Prove you've been listening. Show the executive you understand their current business priorities and how your platform supports those goals.

What to Include:

- Customer's current business priorities
- How your platform supports those goals
- Voice-of-the-exec quotes from discovery calls (if possible)

Example: "We understand your priority this quarter is reducing vendor sprawl and driving more ROI per tool. This review is structured to reflect that."

Common Mistake: Turning this into a bio slide about who you are. The executive already knows who you are. They want to know that YOU know who THEY are.

SLIDE 2: Outcomes Delivered

Purpose: Connect your work to their measurable business results. Answer the question: What did we accomplish together?

What to Include:

- 2-3 specific outcomes tied to metrics THEY care about
- Real metrics: time saved, risk reduced, revenue protected
- NOT vanity metrics like logins or support ticket response times
- Customer quotes validating the value (if available)

Example: "Your security team told us this saved them 40 hours a month. We helped you pass your Q2 audit with zero findings."

Common Mistake: Confusing activity with outcomes. Usage stats and feature adoption are not outcomes. Business results are outcomes.

SLIDE 3: Current State and Gaps

Purpose: Build trust through transparency. Show what's working, what's not, and where they're leaving value on the table.

What to Include:

- What's working well (adoption wins, strong usage)
- Where opportunities exist (departments not onboarded, unused features)
- Frame gaps as opportunities, not accusations

Example: "Adoption in your finance team is at 90%, which is excellent. But your operations team hasn't started onboarding yet - that's a missed opportunity based on their workflows."

Common Mistake: Skipping this slide because you're afraid of looking bad. Executives respect transparency. They can't stand being blindsided.

SLIDE 4: Success Plan and Next Steps

Purpose: Move from observation to action. Tell them exactly what needs to happen next, who needs to do it, and when.

What to Include:

- 3-5 clear, achievable initiatives (not 20)
- Every initiative needs an owner and a timeline
- Mutual accountability: what you're committing to AND what they need to do

Example: "I'll coordinate with your ops lead by end of month to schedule their kickoff. We need your team to identify a champion from operations by next Friday."

Common Mistake: Listing actions without owners or due dates. Every action needs: what, who, when, and how we'll know it's complete.

SLIDE 5: Expansion/Roadmap (Optional)

Purpose: Introduce what's next - but only if you've earned it. This slide works when the executive is engaged and trusting.

What to Include:

- New features aligned with their stated priorities
- Expansion opportunities in other departments
- Strategic roadmap initiatives that solve their mentioned problems

When to Skip: If you haven't earned trust yet, this feels like a sales pitch. Read the room. If they're checked out, skip it.

SLIDE 6: Recap and Commitments

Purpose: Your closer. This is what they'll remember and what gets forwarded to their team.

What to Include:

- Summary of what you covered
- Confirmed action items with owners
- Date for next check-in (lock it in before you leave)

Example: "Just to recap: we're onboarding ops, increasing midwest adoption, and preparing for your Q2 audit. I'll follow up by Friday, and we'll regroup in 90 days. Sound good?"

Common Mistake: Ending with "any questions?" That's passive. YOU lead the meeting. End with clarity and lock in the next touchpoint.

Quick Reference: The 6-Slide Framework

Slide	Purpose	Key Question Answered
1. Strategic Alignment	Prove you understand their business	Do you understand our priorities?
2. Outcomes Delivered	Connect work to business results	What value have you delivered?
3. Current State & Gaps	Build trust through transparency	Where are we at risk or missing value?
4. Success Plan	Move from observation to action	What's the plan to improve?
5. Expansion (Optional)	Introduce what's next (if earned)	What opportunities exist to grow?
6. Recap & Commitments	Lock in next steps and follow-up	What do you need from me?

Remember: The slides don't matter as much as the conversation.

What matters is whether you walk into that room sounding like someone who understands their business, can connect your work to their goals, and can have a real conversation - not just click through a deck.

Next Steps and Resources

This guide is part of the EBR mini-series on ClearPath Conversations:

- **Episode 11:** How to Prepare for Your First EBR Without Burning Out
- **Episode 12:** The Slide-by-Slide EBR Breakdown
- **Episode 13:** How to Present Like You Belong in the Room
- **Episode 14:** EBR Follow-Up: The Part Everyone Forgets

Additional Resources:

- *The Executive Business Review Playbook:* Complete guide to mastering EBRs from preparation to execution
- *ClearPath CX Website:* Templates, frameworks, and resources at ClearPathCX.com
- *LinkedIn:* Connect with Mark at linkedin.com/in/markbernardin

Want more CSM frameworks, templates, and tactical resources?

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