Scheduling quarterly business reviews

A Quarterly Business Review (QBR) is a quarterly status meeting for the stakeholders in your Splunk implementation. The purpose of a QBR is to provide updates on the overall plan, goals, and roadmap for your Splunk implementation. QBRs should include an executive dashboard and summaries of key activities and metrics. QBRs and executive dashboards provide your Executive Sponsor an opportunity to regularly engage with Splunk business goals and priorities.

**Audience**

- Architect
- Executive sponsor
- Search expert
- Knowledge manager
- Program manager
- Project manager
- User community

For more about these roles, see [Setting Roles & Responsibilities](#).

**Plan your QBR**

Planning a successful QBR requires some networking and outreach. Hosts should include the Splunk owner, architect, and program manager.

**Encourage executive involvement**

QBRs are most effective when your Executive Sponsor is involved as a key point stakeholder. This ensures visibility into the initiatives, highlights, and challenges associated with your Splunk implementation.

**Bring in a diverse audience from different teams**

Encourage leaders from all the different teams using Splunk to participate. Bringing in different teams ensures cross-functional review and collaboration, and provides access to diverse data sources for your Splunk correlation.

**Involve your Splunk operations team**

Consider including stakeholders from your computing and storage infrastructure team. This can drive their engagement in the Splunk infrastructure, help them understand the business criticality of Splunk systems,
foster partnership for upcoming maintenance and scaling plans.

Design a QBR

A common format for a QBR is a presentation using a tool like Microsoft PowerPoint or Google Slides. A QBR presentation is a good opportunity to showcase the talents of your Splunk team, and to encourage the input and participation of key members. A QBR should contain the following information:

**Business objectives**

- Splunk project status
- Use case initiatives
- Cross-functional Splunk-related activities
- Key Performance Indicators (KPIs)
- Deployment overview

**License usage**

- Platform performance
- Capacity planning
- Service Level Objectives (SLOs)

**User enablement updates**

- Number of Splunk users
- Educational program status

**Value realization updates**

- Return on Investment (ROI)
- Accomplishments

**Use case showcase**

- Key success stories
- Live demos

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Risk assessment

- Challenges and roadblocks
- Areas of concern

Your QBR should focus on quarterly and annual goals, and avoid tactical details, such as specific platform configurations, issue root cause analysis, or how to build a dashboard. Save implementation details for a Splunk team meeting.

Create an executive dashboard

A Splunk executive dashboard is useful for showing essential Splunk utilization metrics and system health statistics. For example:

For an example of how one company uses Splunk to populate business-critical dashboards for executive overviews and daily operations, see Keeping Your Medical Center CIO Engaged, a presentation given by a Splunk customer at Splunk.conf2017.