Customer Business Review and Next-Action Pack

Review delivered value with the customer before proposing more scope.

Reusable working template

1 · Agree the review and outcome evidence

> Agree the purpose, period and agenda with the customer. Separate delivery, adoption, operational change and financial outcomes. Keep disputed evidence and unmet commitments visible. Agree the next action together.

Joint purpose, time period, participants and agenda

Original outcome and what matters to the customer now

Delivered work and evidence, with source and coverage

Unmet commitments, missing evidence and contrary findings

Original Tibyan working aid, not a validated assessment. Reader testing, field validation and human practitioner/bilingual review have not been completed. Do not enter sensitive information in a shared copy.

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Reusable working template

2 · Separate use from operational change

Eligible population, actual use and missing cases

Observed process change and measurement basis

Customer interpretation, alternatives and evidence gaps

Recover / optimize / investigate expansion

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Reusable working template

3 · Turn the conversation into shared actions

Customer questions and priorities to confirm

Customer/supplier actions, owners and acceptance evidence

Timing, approvals and escalation

Review corrections and further validation

Documented practice: GitLab public handbook, Executive Business Reviews (modified 24 September 2026) and Success Plans (modified 23 October 2026). Company practice, not causal evidence; original Tibyan adaptation.

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Completed hypothetical example — all facts and figures invented

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Joint purpose, time period, participants and agenda

Fictional monitoring supplier/customer review of three contracted manufacturing sites. Customer and supplier agree to review setup, alert handling, manual reconciliation and unresolved barriers before discussing added scope.

Original outcome and what matters to the customer now

Intended outcome: more useful operational monitoring with less manual reconciliation. The customer's current priority must be confirmed; a signed contract does not establish adoption or value.

Delivered work and evidence, with source and coverage

One site is configured; two are not. Keep site records and customer interpretation together. This hypothetical evidence concerns one configured site, not the whole three-site population.

Unmet commitments, missing evidence and contrary findings

Two sites remain unconfigured. Reasons and owners still need investigation. No customer-verified financial benefit exists. Do not turn an incomplete rollout into a three-site success story.

> Why start with outcomes? A feature list or supplier activity report may describe delivery without answering whether the customer's original problem has changed.

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Eligible population, actual use and missing cases

At the configured site,24 of 30 eligible alerts were reviewed:80% for this observation. Two unconfigured sites remain visible and have no comparable alert-use record.80% is not adoption across all three sites.

Observed process change and measurement basis

Comparable manual reconciliation is reported as 6 hours/week at baseline and 4 later:2 fewer hours, about 33.3%. These are invented observations. Check who measured, workload, period and comparability before interpreting them.

Customer interpretation, alternatives and evidence gaps

Ask whether alert review supports the intended workflow. Staffing or process changes may explain part of the time difference. Customer confirmation of a change does not by itself establish supplier causation or cash savings.

Recover / optimize / investigate expansion

Recover setup at the two sites and validate consistent usage/outcome evidence before broader expansion. Optimize the current workflow where justified. A new use case remains a discovery hypothesis, not an automatic proposal.

> Why avoid an ROI headline? Observed hours are not necessarily payroll savings, and one site's change cannot be multiplied across unconfigured sites. Separate use, process change and financial outcome.

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3 · Turn the conversation into shared actions

Customer questions and priorities to confirm

Ask: What changed? What has not improved? Why are two sites not configured? What matters next? Is the reconciliation task still relevant? Invite correction of the supplier's interpretation.

Customer/supplier actions, owners and acceptance evidence

Supplier delivery lead investigates setup blockers with customer site owners. Customer confirms relevant workflow and evidence permissions. Supplier account owner records next steps and unresolved concerns. Agree specific acceptance evidence before claiming completion.

Timing, approvals and escalation

Agree dates to the actual work rather than imposing a universal quarterly cadence. Escalate unresolved delivery obligations. Discuss added scope only when customer need, evidence and delivery readiness justify the next step.

Review corrections and further validation

No field results, reader usability sessions or human practitioner/bilingual review have been completed for this aid. Record disputed facts, action completion, failed assumptions and whether users can distinguish outcome levels.

> A responsible growth conversation may lead to recovery or optimization first. The customer's priorities and evidence determine whether expansion deserves investigation.

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