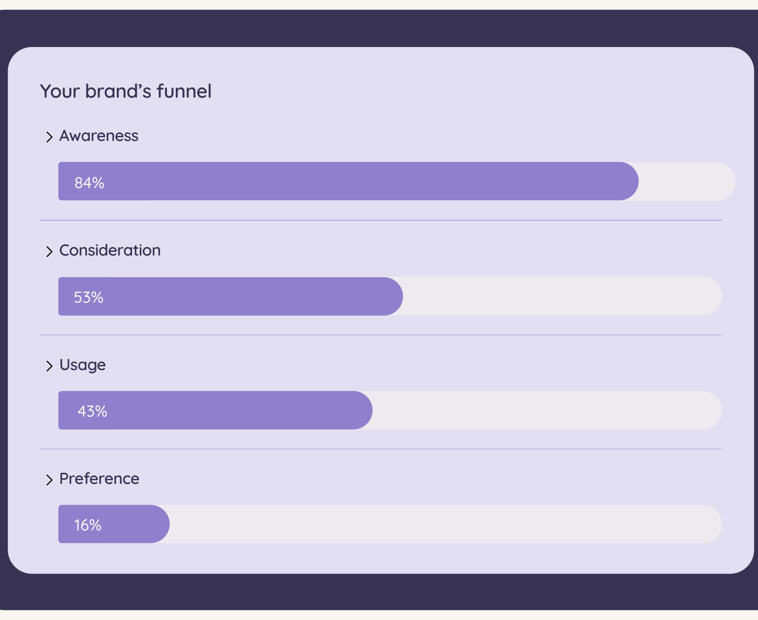
The brand health QBR prep framework

How to turn a quarterly review into your strongest retention and growth conversation.

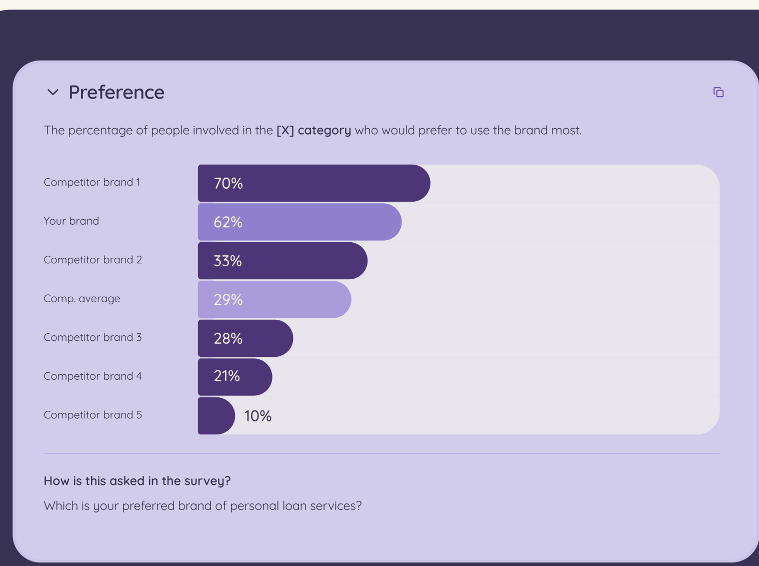
You know the moment: Your client QBR's tomorrow, you've got the campaign metrics teed up, plus the snazzy media report…and then the client asks the one question neither of those fully answers: "So, is the brand actually growing?"

Most QBRs are treated like a status update, instead of the meeting where you re-earn the retainer and tee up the next piece of work. Brand health data is what turns "here's what we did" into "here's what's working, here's what it's worth, and here's what we'd do next."

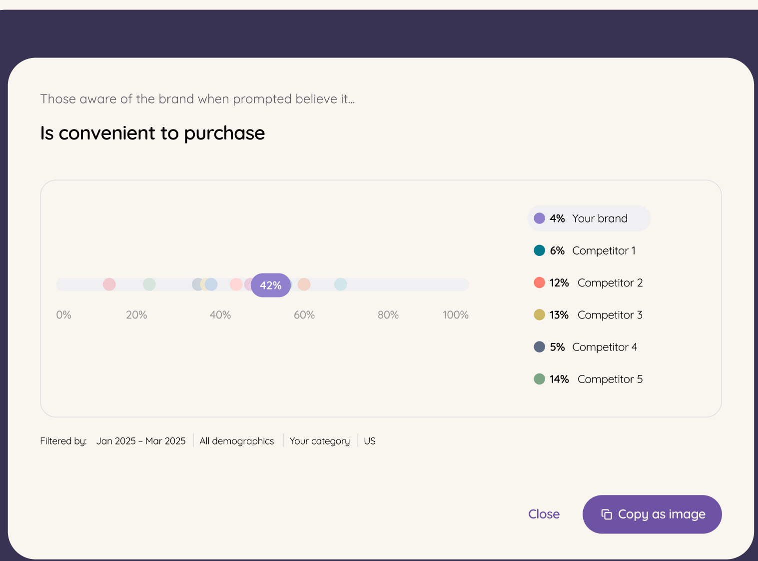
Here's how to prep for it in four steps.



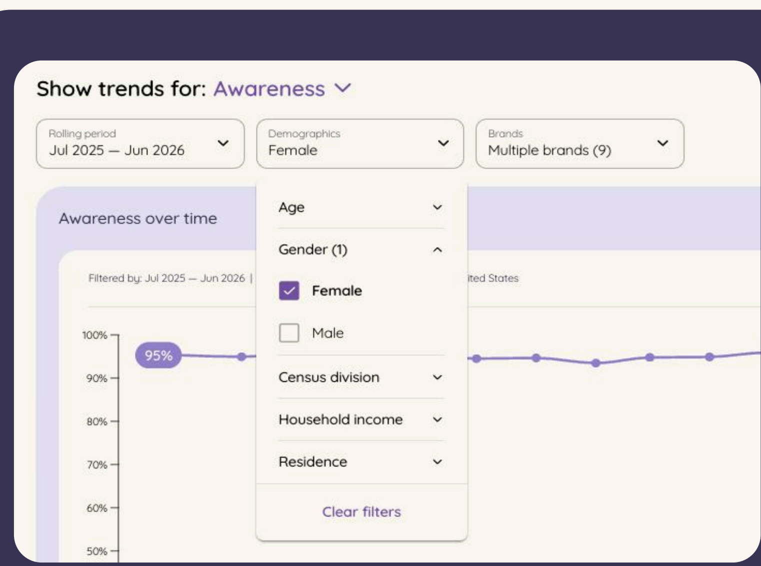
Funnel movement



Preference vs competitors



Associations & statements



Segment filter

Step 1: Find the brand story

Pull the metrics you need that tell the brand story for the quarter. For example, if preference dipped against a competitor in month two, that's the setup for the recommendation you'll make.

You can use Tracksuit to discover what has and hasn't changed this quarter in the metrics that matter most:

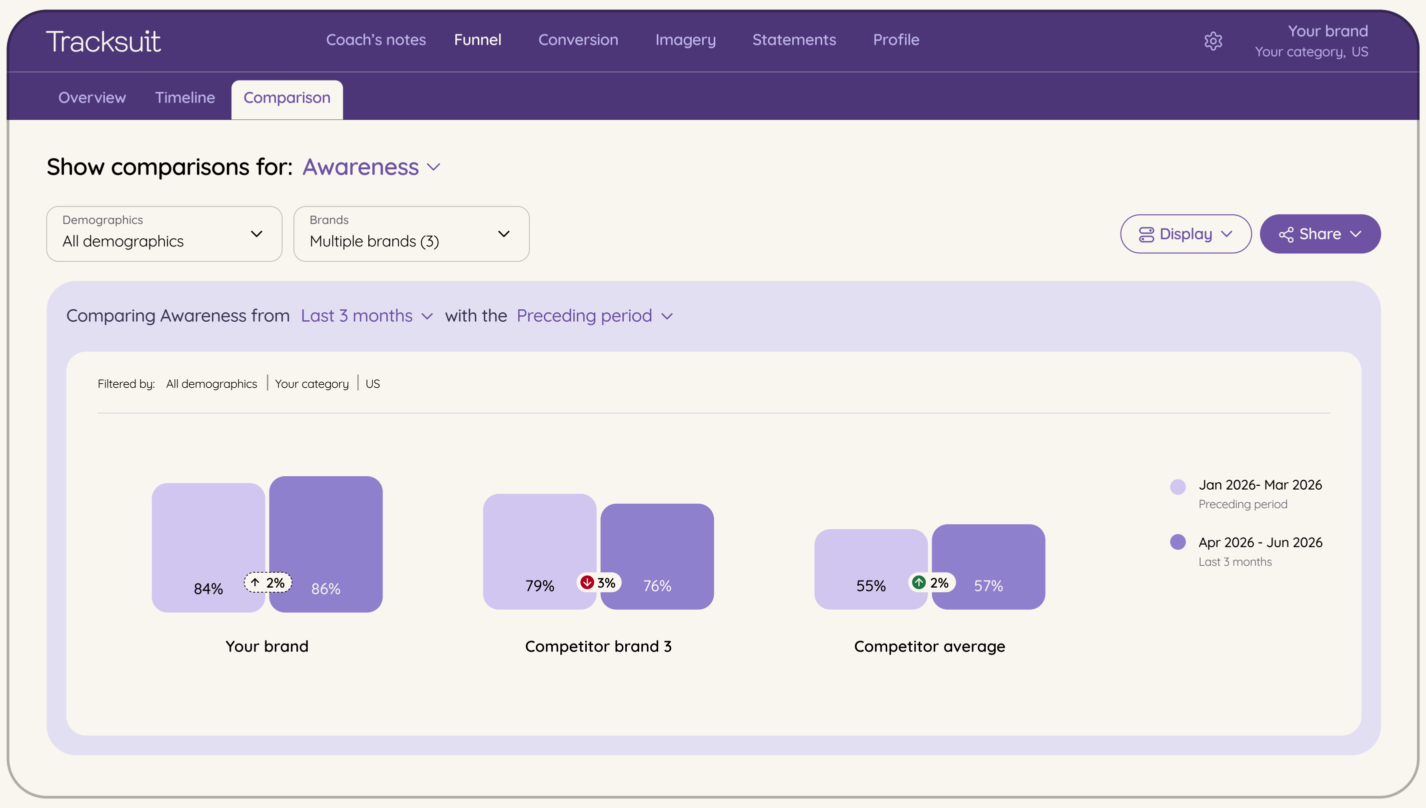
- **Funnel movement:** where awareness, consideration, and preference have shifted over the last three months
- **Preference vs competitors:** where your client sits against the category, and whether the gap is closing or widening
- **Associations & statements:** which perceptions are strengthening (and which aren't); this is the "why" behind the Funnel movement
- **Segment view:** which audiences are driving the movement, especially any over- or under-performing against expectation

Shortcut: With Tracksuit, our Comparison View gives you a quick and direct read on how you performed this quarter compared to last, so you're not starting from a blank chart.

Step 2: Frame the narrative (from "where we were" to "what to do next")

Don't walk in with a screenshot dump. Build the data into a simple four-part story:

- **Where we were:** the baseline at the start of the quarter
- **What shifted:** the movement, whether it's up, down, or holding (all three are worth a story)
- **What's driving it:** the associations, segments, or category dynamics behind the shift
- **What to do next:** the implication, which becomes your recommendation in step 4

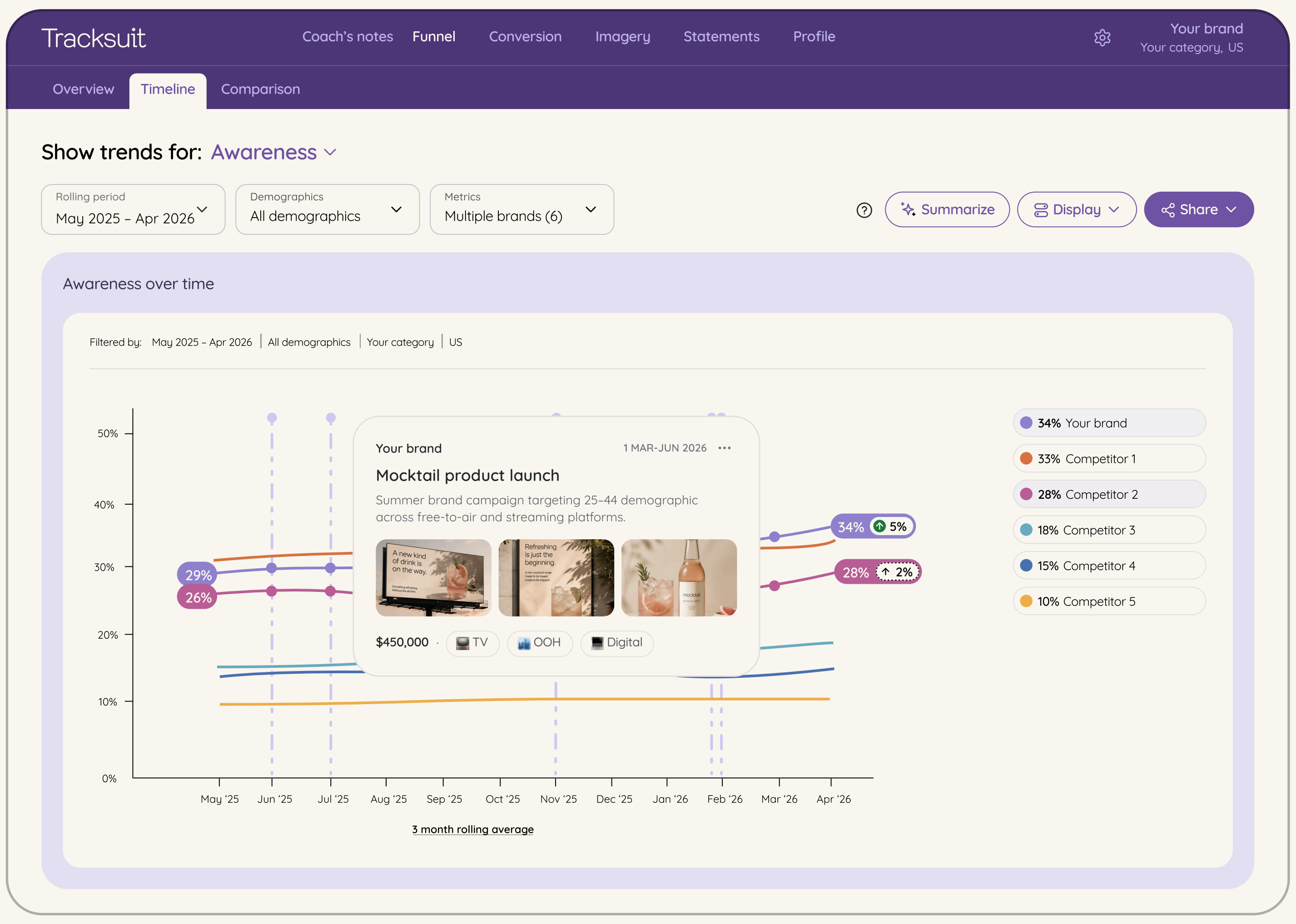


This is the part that separates reporting numbers from thinking like a strategist. The client can read a chart, but what they need is deeper interpretation of the data.

Here's a few examples of how you can interpret data:

- **Give context into the movement against the category.** "Preference dipped 2% this quarter, but the category as a whole dropped 5%" is helpful context when showing how a brand actually gained ground on its competitors.
- **Use metrics to explain "why."** "Awareness held flat, but consideration rose in the 25-34 segment, which lines up with the campaign we ran for them in March." That tells the client why something moved, not just that it did.
- **Separate a blip from a trend.** "Awareness ticked down this month, but it's up 6 points over six months, so this looks like normal month-to-month noise rather than a real decline." It stops a single soft data point from derailing the conversation.

Step 3: Connect the brand shift back to the work



This is where you defend your retainer. Pin the campaigns and brand moments you delivered this quarter against the brand movement that followed, so the two sit side by side: the work you did, and what it did.

Tracksuit's Brand Context feature makes this easy: you can pin each moment onto your Timeline and the brand movement lines up right next to what drove it:

- "We launched X in [month], here's the lift in awareness that followed."
- "We shifted the creative toward [association], here's how perception moved."

You're drawing a straight line between your agency's work and your client's brand health. That line is the single most powerful thing you can put in front of a client who's wondering whether the retainer's worth it.

Step 4: Land a forward-looking recommendation (don't end on "any questions?")

This is where you grow the account. Every QBR should close with a recommendation, not a Q&A. The data has already shown you the gap, so you can turn it into the next brief:

- A segment that's under-performing can be turned into a campaign to reach it
- A competitor closing in is a brand defense play
- An association that's not landing is an opportunity to give creative or comms an update
- A Funnel stage that's stalling is a case for reallocating spend

Close with "here's what we'd do next, and here's the data that says why." That's the difference between a client who renews and a client who expands.

Run this every quarter and the QBR stops being the meeting you dread and becomes the one where you prove your value and win the next brief, backed by data your clients can see for themselves.

Tracksuit makes it easy to walk into every QBR with proof with always-on awareness, consideration, and preference data you can pull anytime, pin against the campaigns that drove the movement, and turn into your next brief.

👉 Book a demo of Tracksuit