



# 5 Simple Steps to Gear up for Your Strategic Business Review (SBR)

Use this checklist to prepare for and guide the conversation with your Account Manager to ensure a more impactful SBR.

An SBR is an insightful evaluation led by your Account Manager to assess how your Adobe Experience Cloud investment supports your business goals.

The review provides valuable recommendations to address challenges and enhance your current achievements. By utilizing this checklist, you'll enable your teams to make data-driven decisions, foster measurable success, and ensure tailored recommendations and support from your team at Adobe.

# Summary of 5-Step Checklist

- ✓ **Step 1:** Meet with Key Internal Stakeholders to gain diverse insights.
- ✓ **Step 2:** Review Last Year's Goals and Results for progress evaluation.
- ✓ **Step 3:** Identify Future Goals and Objectives to align strategic initiatives.
- ✓ **Step 4:** Prepare Questions for Your Account Manager to maximize Review benefits.
- ✓ **Step 5:** Schedule Your SBR.

**Read on for detailed guidance and best practices for each step.**

# Step 1: Meet with Key Internal Stakeholders

Identify key internal stakeholders to involve in these discussions. The goal is to gain a holistic understanding of your Adobe investment's impact by gathering diverse perspectives.

## Recommended stakeholders to include are:

- **Executive Leadership and Decision Makers:** These individuals can provide strategic context and alignment with broader business objectives.
- **Adobe Product End-Users:** Those who work directly with Adobe and can offer insights into day-to-day interactions, future plans, successes and challenges.
- **Technical Resources:** IT personnel or support staff who manage and maintain Adobe Experience Cloud products, ensuring technical feasibility and integration.

## Step 2: Review Last Year's Goals and Results

Once you have identified who to include in these discussions, the next step is to review the goals and results you made last year with your Adobe Experience Cloud investment. These can be process-oriented goals, such as “launch more campaigns” and “streamline operations” or results-oriented goals, such as “increase customer engagement” and “boost sales volume.”

**Evaluate your performance for each goal to understand progress, achievements, and areas for improvement. Begin by answering these questions:**

- What did we want to accomplish and why?
- Which metrics did we track?
- Where did we start last year?
- Where are we today?

## Step 3: Identify Goals for the Future

Now, think about what goals you would like to achieve over the next year or so. For each goal, you'll want to answer the following questions:

- What do we want to accomplish and why?
- How will we measure our success?
- Where are we today?
- What kind of help do we need to achieve these goals?
- Do we understand how Adobe solutions can help us achieve these goals?

## Step 4: Make a List of Questions for Your Account Manager

Your SBR is an opportunity to get answers from your Account Manager on your organization's top priorities. Now is the time to pull together your team's questions about how your Adobe partnership can do more for your business. While every organization has its own unique concerns, some commonly asked questions are:

- How can we improve the ROI of our Adobe investment?
- Are there features that could help us achieve our goals that we aren't using?
- How can we take advantage of new AI-powered features?
- Are there strategies that other companies like ours are succeeding with?
- Are there other Adobe products or solutions that can help us achieve our goals?

**Send these to your Account Manager beforehand to establish expectations for your SBR.**

## Step 5: Book Your SBR Session

We suggest scheduling at least one SBR annually to evaluate your progress and set goals for the future. A good time to schedule the SBR is six to nine months before the anniversary of your partnership with Adobe to ensure that your organization is strategically set up for success in the upcoming year and maximizes its progress.

Consider key events that may impact your planning, like busy seasons or yearly planning sessions. Connect with your Account Manager for guidance on optimal timing for your SBR. If you don't have an Account Manager, talk to your account executive about options for this strategic discussion.

## Conclusion

By following this checklist, you'll be well-prepared for a productive and impactful SBR, setting the stage for even greater success in the year ahead.

Have questions? Reach out to the Adobe Strategy Team at [strategy@adobe.com](mailto:strategy@adobe.com) for assistance.



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