



THE CH4B BUSINESS REVIEW GUIDE

For SME Business Owners.

A practical step-by-step guide from CH4B, written and developed by our Strategic Business Coach Team



Contents Page



1. Introduction
2. Business Review - The Plan Template
3. Behind The Scenes
4. Final Thoughts



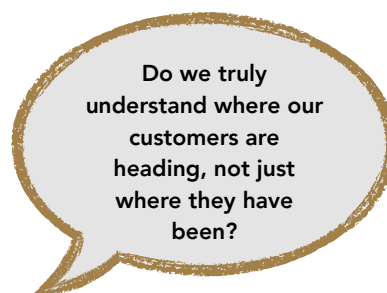
Introduction

A structured business review is not about looking backwards for the sake of reporting. It is about creating the space to reconnect, reflect, and reset direction together. This guide is designed to help you lead meaningful review conversations that strengthen relationships, surface opportunities, and align future plans. A well-run review balances performance, insight, and empathy. It allows you to demonstrate value by showing that you understand your customer's world, not just your own products or services.

By combining strategic questioning, relevant insight, and a clear view of past performance, the review becomes a forward-looking conversation rather than a transactional update. Used consistently, this approach supports retention, builds trust, and opens the door to deeper collaboration.

Use this guide as a framework, not a script. The quality of the conversation will come from how well you listen, adapt, and connect the discussion back to where your customer is heading and how you can support them on that journey.

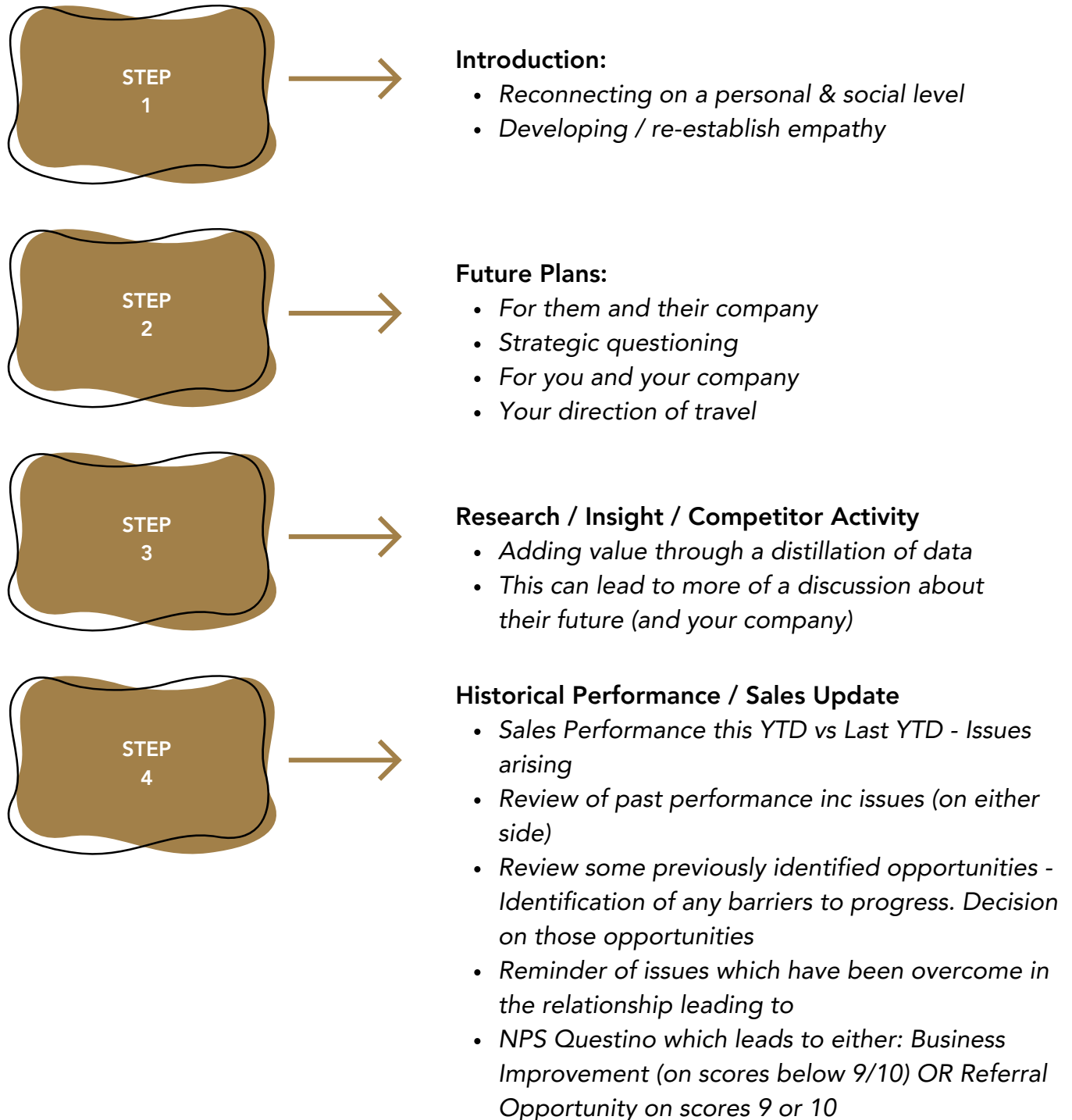
If you're asking these questions, read on...





Business Review - The Plan Template

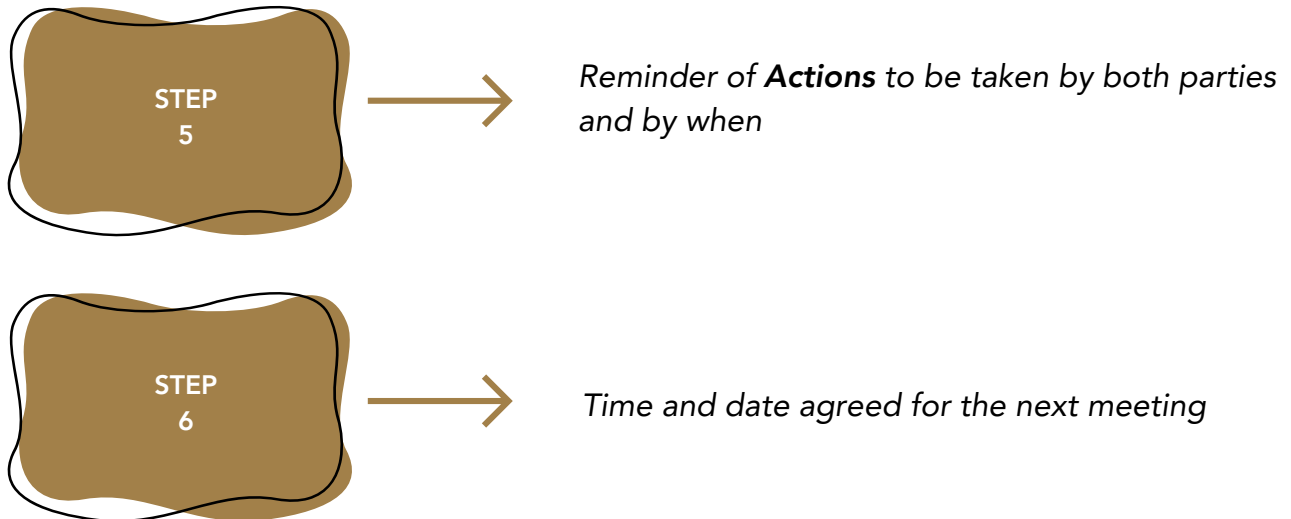
This is a practical template, recommended and used internally with our Strategic Business Coaches here at CH4B. Intentionally kept simple, yet effective for the end user.





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Measure, refine and sustain.



The Bit Behind The Scenes

Background

A good Business Review with existing (important) customers is a key method for retaining those customers and identifying more opportunities with them. It is also a way in which additional value is added through understanding, research and insight into the market in which your Customers operate in.

Future Plans

Whilst a key part of the review is to look back over historical performance, the key benefit will come through an understanding of future behaviours. This is where Strategic questioning comes in. The objective here is to determine your Customer's plans and share with them your plans too. In an ideal world, these will be aligned with one another. If you are drifting apart, the role of the account handler is to recognise this and report back to Head office what the consequences might be.

In short, the purpose of a business review is to use insight, reflection, and strategic questioning to ensure both parties remain aligned and moving forward together.





The Bit Behind The Scenes cont.....

Research / Insight / Competitor Activity

One of the key ways in which you can add value to your relationship is by distilling data from multiple sources and turn it into relevant information for your customer saving them time.

Sales Update / Performance

This is arguably the core of the meeting where you look back over historical transactions and identify new opportunities, some of which may have been identified at previous meetings. If you have asked the Strategic questions earlier, a number of your products / services will align with your Customer's future path, making the sale a lot easier.

At this section you are also reminding your customer about the issues that you have helped them to overcome through your products or services. This is important because Customers forget and need to be reminded. It also leads to the Net Promoter Score question. Which might be as follows: *"Given the service we have provided you with over the last 6 months, on a scale of 1 – 10, how would you mark our performance?"*

If they mark you at below 9, then the follow up question needs to be, "What could we have done to make that score higher?" This will lead them to highlight issues within your business which you need to improve. They can be added to the next review.

If they mark you at 9 or 10 then this is the time to ask them for a referral as they are advocates of your business

Admin

The last important elements of the meeting are agreeing what action is going to be taken by whom and by when, including agreeing a time and date for the next meeting.



Final thoughts...

A well-structured business review is one of the most powerful tools you have to protect relationships, demonstrate value, and create future opportunity. When reviews move beyond routine updates and focus on insight, alignment, and strategic conversation, they become a catalyst for stronger partnerships.

By consistently preparing, asking the right questions, and connecting past performance with future plans, you position yourselves as a trusted advisor rather than a supplier. This approach not only improves retention, but also naturally opens the door to deeper engagement, additional opportunities, and advocacy.

At its best, a business review is a shared reset. It ensures both parties remain aligned, issues are surfaced early, and the relationship continues to move forward with clarity and purpose.

If business reviews feel inconsistent, uncomfortable, or unclear, you are not alone. Many SMEs recognise the value of better conversations but are unsure where to start or how to structure them effectively. With the right framework and support, reviews become simpler, more confident, and far more impactful.

At CH4B, we support SMEs in turning everyday meetings into meaningful strategic conversations. If you want your business reviews to add real value rather than tick a box, we are here to help.

Are you ready to take the next step and benefit from the CH4B ecosystem?

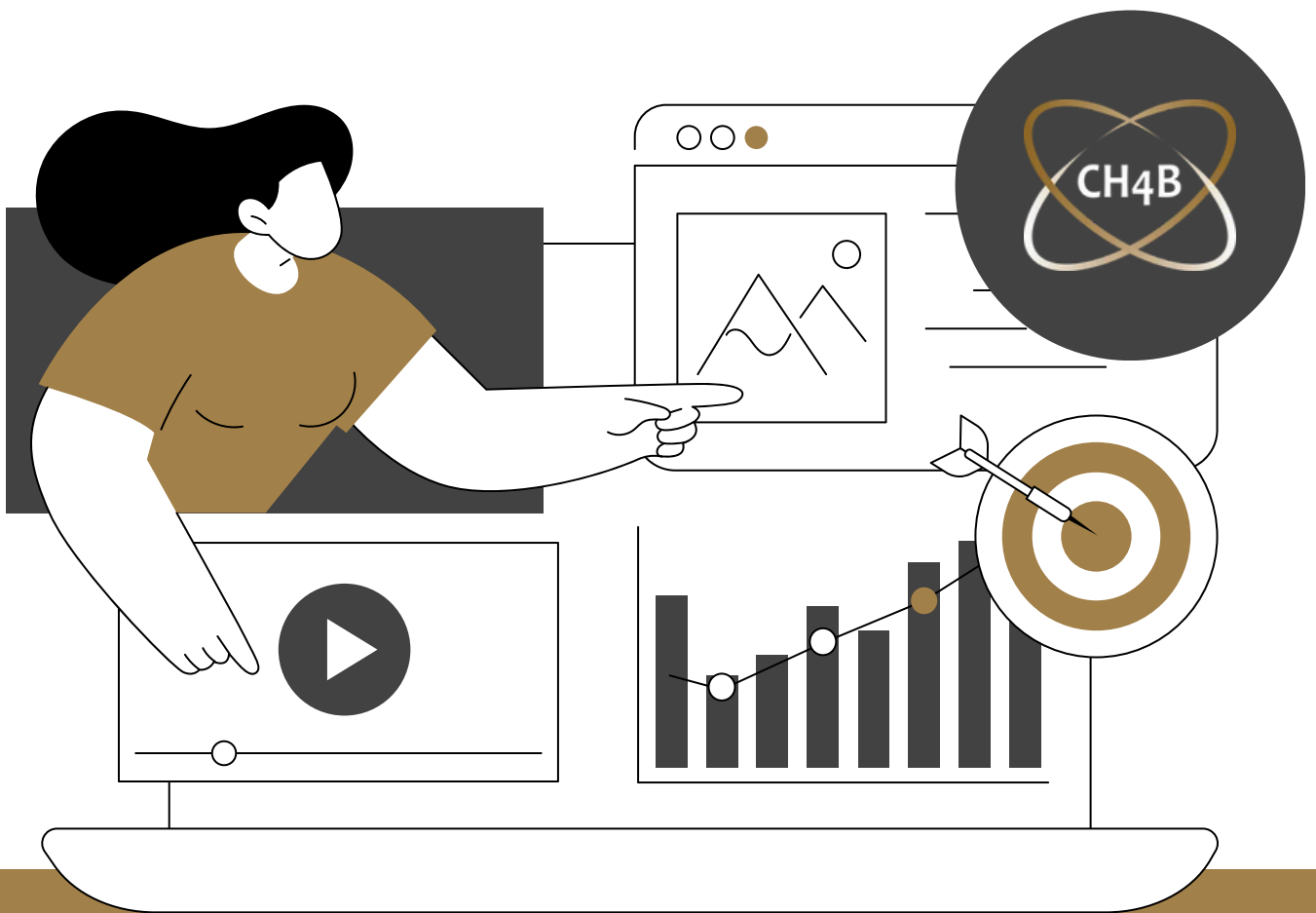
Book a call to discover how we can help you.



We helped Arcata Projects increase turnover from £60k to £2.4m in two years.



We increased turnover by 22% year-on-year for an Electrical Contractor.



Central Hub 4 Business

One Place 4 All Your Business Needs

CH4B is a vibrant membership community dedicated to empowering business owners across the UK. Our mission is to help small businesses thrive through strategic business coaching, knowledge sharing and access to top-tier Expert Partners. Together, our entrepreneur and small business support system will revolutionise your business practices.

Book a complimentary strategy call with a CH4B Business Advisor to find out how we can help you and your business.