MEETING NOTES

**Fictional Non Existent LLC**

# Customer Success Team Weekly Sync

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| **Date:** | February 5, 2025 |
| **Time:** | 10:00 AM - 11:00 AM EST |
| **Location:** | Virtual - Zoom |
| **Facilitator:** | Maria Gonzales, Director of Customer Success |
| **Note Taker:** | Emily Chen, Customer Success Manager |
| **Attendees:** | Maria Gonzales, Emily Chen, Jake Harrison, Sophia Patel, Carlos Rodriguez, Nicole Turner |
| **Absent:** | Brian Matthews (PTO) |

Weekly team sync to discuss customer health, escalations, upcoming renewals, and team updates.

## Team Updates & Announcements

* Welcome to our newest team member, Nicole Turner, who joined as a CSM on Monday. Nicole comes from TechSolutions Inc. and brings 5 years of SaaS customer success experience.
* The new customer health scoring system goes live next Monday (Feb 12). Maria shared a quick demo and reminded everyone to complete the training module by Friday.
* Team offsite is scheduled for March 15-16 at the downtown office. Agenda will focus on Q2 planning and process improvements.

## Customer Health Review

### Accounts Requiring Attention

**TechVision Corp (Jake's account)**

* Status: Yellow (Medium Risk)
* Issue: Product adoption has stalled at 40% of licensed users. Their main champion, Susan Lee, left the company last month.
* Jake's plan: Schedule intro call with new IT Director (starts Feb 15), send personalized training invites to inactive users, offer onsite workshop.
* Team feedback: Sophia suggested involving product team for a roadmap session. Maria approved and will make the introduction.

**DataFlow Industries (Sophia's account)**

* Status: Red (High Risk)
* Issue: Raised concerns about recent platform performance issues. Frustrated with support response times. Contract up for renewal in 45 days.
* Sophia's plan: Executive escalation meeting scheduled for tomorrow with their CTO and our VP Engineering. Committed to weekly check-ins until issues resolved.
* Team feedback: Carlos offered to help with technical documentation. Maria emphasized importance of proactive communication.

**MediCare Solutions (Emily's account)**

* Status: Yellow (Medium Risk)
* Issue: Budget cuts announced - exploring lower-tier pricing options.
* Emily's plan: Presenting ROI analysis tomorrow showing $180K in efficiency gains. Exploring custom pricing with Sales team.
* Team feedback: Jake shared similar situation he handled last quarter - offered to share case study materials.

### Success Stories

**CloudNine Systems (Carlos's account)**

* Expanded from 50 to 150 users this week - 200% growth!
* Customer is thrilled with results and volunteered to be a case study
* Team gave kudos to Carlos for excellent relationship building

**Quantum Analytics (Jake's account)**

* Achieved 95% user adoption within first 60 days
* Provided testimonial for marketing team and 5-star G2 review

## Upcoming Renewals (Next 60 Days)

| **Customer** | **Renewal Date** | **CSM** | **Status** |
| --- | --- | --- | --- |
| DataFlow Industries | March 22 | Sophia Patel | **At Risk** |
| RetailMax Corp | March 28 | Emily Chen | **On Track** |
| FinServe Partners | April 3 | Carlos Rodriguez | **On Track** |
| GlobalTech Enterprises | April 6 | Jake Harrison | **Needs Attn** |

**Note:** All renewal kick-off calls should be scheduled at least 90 days before renewal date per new process.

## Process Improvement Discussion

The team discussed ways to improve quarterly business review (QBR) effectiveness after receiving feedback from several customers.

**Ideas discussed:**

* Send QBR agenda 1 week in advance (currently 3 days) - Emily
* Include more visual data and fewer slides - Jake
* Create industry-specific QBR templates - Carlos
* Record QBRs (with permission) for internal team learning - Sophia
* Reduce standard QBR length from 60 to 45 minutes - Nicole

**Decision:** Maria will work with Emily and Jake to pilot new QBR format with 3 customers next month and report back results.

## Training & Development

* Product training on v3.2 features scheduled for Feb 12 at 2 PM - attendance mandatory
* Carlos volunteered to lead a lunch-and-learn on technical troubleshooting techniques next Tuesday
* Reminder: Complete LinkedIn Learning course 'Customer Success Metrics' by end of month

## Questions & Open Discussion

**Q:** When will we get access to the new reporting dashboard? (Nicole)

**A:** Maria confirmed it's in final testing and should be available by end of February.

**Q:** Can we get Slack alerts for customer health score changes? (Jake)

**A:** Great idea - Maria will submit feature request to product team.

**Q:** What's the process for requesting engineering support for customer issues? (Sophia)

**A:** Carlos explained the escalation workflow - Sophia to follow up offline for specific DataFlow issue.

## Action Items

| **Action Item** | **Owner** | **Due Date** |
| --- | --- | --- |
| Schedule intro call with TechVision's new IT Director | Jake Harrison | Feb 15 |
| Conduct executive escalation meeting for DataFlow | Sophia Patel | Feb 6 |
| Present ROI analysis to MediCare Solutions | Emily Chen | Feb 6 |
| Make intro to product team for TechVision roadmap session | Maria Gonzales | Feb 8 |
| Pilot new QBR format with 3 customers | Emily & Jake | Mar 15 |
| Submit Slack alerts feature request to product team | Maria Gonzales | Feb 9 |
| Complete customer health scoring training module | All Team | Feb 9 |

**Next Meeting:**

February 12, 2025 at 10:00 AM EST

**Notes prepared by:**

Emily Chen, Customer Success Manager