Subject Line: CLIENT - 60 Day Check-In Call

CC:

Hi ADNAME,

### Hope all is well! I wanted to let you know that the 60-Day Check-In call for  CLIENT needs to be scheduled soon as their official 60-day mark is on **DATE**.

[ Here](https://accelerationpartners.sharepoint.com/:w:/s/ClientServicesTeam/EYd0LmMpwZtMhrd05NQ2XvwBjVKhX0bK2pvSf89dJsrC0A?e=PXWFJD) is the link to the updated process document that includes templated emails that you can send to both the client and the delivery teams. I’ve also included the full process below for reference:

1. Account Team AD will email client contacts asking to schedule a 30-minute call on or close to Day 60. *Please use the first email template to send to the client contacts*.
   1. If the client status is yellow or red, include Dept Head (Hayley, Chelsey, Amanda)
2. Once confirmed by the client contacts, the Account Team AD schedules a 30-minute call using the account team AD’s Zoom line.
3. Once the call is scheduled, the Account Team AD emails the account manager and associate requesting a high-level overview of the client engagement so far, what’s working/pain points, as well as the latest weekly and EOM reports. *Please use the second template to send to the account team.*
4. Account team AD sends call recap and action items after call.
   1. We recommend sending separate emails to the client (so they know they are heard) and account team (to define action plan)
   2. CC Department Head on internal follow up email

Please let me know if you have any questions!

Best,

Allegra