

Client Report

StartupXYZ - SaaS Subscription Implementation

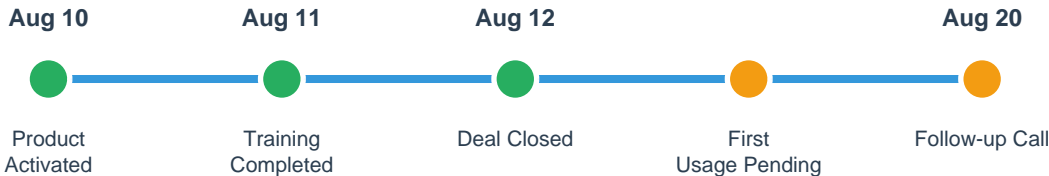
August 16, 2025

Client Overview

Implementation progress for StartupXYZ's new SaaS subscription:

- **Company:** StartupXYZ
- **Description:** A growing tech company focused on providing cloud-based SaaS solutions for small and medium-sized businesses, aiming to streamline internal workflows and improve operational efficiency through software automation.
- **Investment:** \$25,000 SAAS Subscription Deal
- **Project Start (Deal Closed):** August 12, 2025
- **Sales Representative:** Emily Rodriguez
- **Current Status:** Implementation Phase - Awaiting First Reports Generation and Adoption Review

■ Key Milestones & Timeline



Implementation Progress Status

Current implementation status and milestone completion:

■ Complete | ■ Pending

Milestone	Status
Deal Closed	■ Complete
Product Activated	■ Complete
User Onboarding & Training	■ Complete
First Reports Generation	■ Pending
Follow-up Call (Aug 20, 2025)	■ Pending

Recent Collaboration & Notes

Last Meeting: August 11, 2025

Sales Representative: Emily Rodriguez met with the client team.

Meeting Outcomes:

- Deal finalized and SAAS subscription purchased.
- Product activated and initial setup completed.
- User onboarding and training sessions completed.
- Follow-up call scheduled for August 20, 2025.

Client Interest: The client expressed significant interest in expanding their subscription to additional teams in Q4 2025, indicating positive initial engagement and potential for growth.

Next Steps & Action Items

Immediate Priorities:

■ Pending Actions:

→ Complete first reports generation and review initial usage.

■ Scheduled Follow-up (August 20, 2025):

→ Conduct follow-up call to review product adoption and discuss next steps.

■ **Future Planning:**

→ Discuss expansion of the SAAS subscription to additional teams in Q4 2025.