THE COMPLETE FOURKITES AGENT STUDIO CUSTOMER LIFECYCLE PLAYBOOK

From First Discovery Call to Successful Renewal

Version 1.0 - End-to-End Process Documentation

TABLE OF CONTENTS

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1. EXECUTIVE OVERVIEW

Our Philosophy

Move discovery LEFT in the sales cycle to ensure customer success from day one. Deep discovery upfront leads to accurate scoping, successful implementations, and lifetime customer value.

The Customer Journey at a Glance

```
None
Pre-Sales Discovery → Sales Contract → Implementation → Customer
Success → Renewal & Expansion
     (Deep)             (Clear Scope)     (Value Dashboard)
(Optimize)        (Proven ROI)
```

Critical Success Gates

1. **Discovery Gate:** Complete understanding before proposing solution
2. **Contract Gate:** Clear scope and success metrics before signing
3. **Value Gate:** Dashboard proving ROI before Customer Success handoff ⭐
4. **Renewal Gate:** Documented value before renewal discussion

Key Principles

- No shortcuts in discovery - understand deeply before selling
- No handoff to Customer Success without proven value dashboard
- Every metric tracked must tie to customer's business outcomes
- Success is measured by customer ROI, not feature adoption

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2. PHASE 1: PRE-SALES DISCOVERY

2.1 Objective

Deeply understand the customer's current processes, pain points, and value opportunities BEFORE proposing any solution.

2.2 Duration & Timeline

- **Total Duration:** 5-7 business days
- **Customer Time Investment:** 2 hours (two meetings)
- **Internal Processing:** 4-6 hours

2.3 Team Composition

- **Pre-Sales Consultant** (Lead)
- **Account Executive** (Relationship owner)
- **Sales Engineer** (If technical complexity requires)
- **Customer Stakeholders:** Process owners, IT, Finance, Operations

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2.4 MEETING 1: DISCOVERY CALL

Duration: 60 minutes

2.4.1 Pre-Meeting Preparation (30 minutes)

Research Checklist

- [ ] Customer's industry and market position
- [ ] Recent news, acquisitions, or strategic initiatives
- [ ] Common industry pain points and benchmarks
- [ ] Existing relationship with FourKites
- [ ] Similar customer success stories
- [ ] Competitive landscape

Materials to Prepare

- Discovery Guide (printed or digital)
- Note-taking tool or recording setup
- Industry benchmark data
- ROI calculator template
- Calendar for scheduling Meeting 2

2.4.2 Meeting Structure & Conversation Flow

Opening (5 minutes)

```
None
INTRODUCTIONS:
"Thank you for your time today. I'm [Name], Pre-Sales Consultant,
and I'll be
understanding your process to design your solution. With me is
[AE Name] who
will be your ongoing relationship manager."
```

```
SET EXPECTATIONS:
"Our goal today is to deeply understand your current process, the
challenges
you face, and what success looks like for you. Based on this,
we'll build
your specific solution and show it to you in our next meeting."

PERMISSION TO RECORD:
"Would it be okay if I record this for my notes? This helps me
capture
everything accurately and build your solution correctly."
```

Section 1: Current Process Discovery (20 minutes)

Opening Question:

> "Can you walk me through your [specific process] from start to finish? Pretend I'm a new employee on your team learning this for the first time."

Deep-Dive Questions:

```None
TRIGGER & FREQUENCY:
- "What triggers this process to start?"
- "How often does this happen per day/week/month?"
- "Are there specific times or patterns?"

STEPS & SYSTEMS:
- "Then what happens next?"
- "What system do you go into for that?"
- "What information do you need at this step?"
- "How do you know what to do next?"

PEOPLE & DECISIONS:
- "Who is involved at each step?"
- "Who makes decisions here?"
```

```
- "What information do they need to decide?"
- "How do they get that information?"

EXCEPTIONS & ESCALATIONS:
- "What happens when the normal process doesn't work?"
- "How do you handle exceptions?"
- "When do you escalate? To whom?"
- "Can you give me a recent example?"
```

What to Listen For:

- Manual steps that could be automated
- Waiting/delays between steps
- Multiple system logins
- Excel spreadsheets
- Email/phone communications
- Repeated mentions of "checking" or "monitoring"
- Frustration indicators ("always", "never", "constantly")

Example Discovery Dialogue:

```
None
Customer: "Every morning at 8 AM, Sarah logs into our TMS to
check for
          late shipments. She exports everything to Excel..."

Pre-Sales: "How does Sarah know which shipments to focus on?"

Customer: "She filters for anything more than 2 hours late, then
checks
          the value. If it's over $50K, it's high priority."

Pre-Sales: "What does she do for those high-priority ones?"

Customer: "She has to email the carrier for an update, but first
she
```

```
          looks up their contact in another spreadsheet, which
isn't
          always current..."

Pre-Sales: "How long does this whole process take Sarah?"

Customer: "Usually 3-4 hours every morning, more if there are
lots of issues."
```

Section 2: Business Impact Quantification (15 minutes)

Opening Transition:

> "This sounds like a significant effort. Help me understand the business impact when things go wrong or take too long."

Value Discovery Framework:

```None
DIRECT COSTS:
- "What does it cost when [problem] happens?"
- "How much are you paying in [detention/penalties/expedites]?"
- "What are the financial penalties for missing targets?"
- "Can you share rough numbers, even ballpark?"

LABOR COSTS:
- "How many people work on this process?"
- "How many hours per day/week?"
- "What's the opportunity cost of this time?"
- "What strategic work isn't getting done?"

SERVICE & COMPLIANCE:
- "How does this affect your customer relationships?"
- "What's your current performance versus target?"
- "Are there contractual SLAs you need to meet?"
- "How does this compare to your competition?"
```

```
RISK & REPUTATION:
- "What's at risk if this continues?"
- "Have you lost customers over this?"
- "What would happen if this got worse?"
```

Calculation in Real-Time:

```None
Pre-Sales: "So if I understand correctly:
- Detention costs: $15K/month = $180K/year
- Sarah's time: 4 hours/day × $50/hour × 260 days = $52K/year
- Tom's time: 2 hours/day × $50/hour × 260 days = $26K/year
- OTIF penalties: ~$20K/month = $240K/year
- Total impact: Roughly $498K per year?"

Customer: "Yes, and that doesn't include the customer
satisfaction issues."
```

Section 3: Desired Future State (15 minutes)

Opening Transition:

> "Now let's talk about the ideal state. If we could wave a magic wand and fix all of this, what would it look like?"

Vision Questions:

```None
AUTOMATION DESIRES:
- "What parts should happen automatically?"
- "Where do you still want human involvement?"
- "What decisions should remain manual?"
- "What would you want the system to handle?"

VISIBILITY NEEDS:
```

```
- "What information do you wish you had?"
- "What would you want to know proactively?"
- "How would you want to be alerted?"
- "What reports would help you manage better?"

SUCCESS DEFINITION:
- "How would you measure success?"
- "What KPIs matter most to your leadership?"
- "What would 'great' look like in 6 months?"
- "How would this change your team's day?"
```

Section 4: Constraints & Considerations (10 minutes)

Opening Transition:

> "Before we design your solution, what constraints or requirements should we keep in mind?"

Constraint Discovery:

```None
TECHNICAL:
- "What systems must we integrate with?"
- "Are there security or compliance requirements?"
- "What data is available electronically?"
- "Any systems we cannot touch?"

ORGANIZATIONAL:
- "Who needs to approve this project?"
- "How does your team prefer to work?"
- "Any change management concerns?"
- "Previous automation experiences?"

SCOPE & TIMELINE:
- "Should we start with specific locations/carriers?"
- "What's explicitly out of scope?"
```

```
- "What's your ideal timeline?"
- "Any critical dates we should know?"
```

Meeting Wrap-Up (5 minutes)

```None
SUMMARIZE:
"This has been incredibly helpful. Let me summarize what I heard:
- [Key process points]
- [Main pain points]
- [Critical success metrics]
Is that accurate?"

SET EXPECTATIONS:
"Here's what happens next:
1. I'll analyze everything we discussed
2. Build your specific workflows in our platform
3. Calculate the ROI based on your numbers
4. Meet again on [date] to show you exactly how we'll solve this"

SCHEDULE MEETING 2:
"Let's schedule 45 minutes on [date]. Should we include anyone
else
who would want to see the solution?"

THANK YOU:
"Thank you for being so thorough. This gives me everything I need
to build your solution. You'll be amazed at what we show you next
week."
```

2.4.3 Discovery Documentation Template

```None
## CUSTOMER DISCOVERY NOTES
**Customer:** [Name]
```

```
**Date:** [Date]
**Participants:** [Names and roles]

### CURRENT STATE PROCESS
**Process Name:** [e.g., Late Shipment Management]
**Frequency:** [e.g., 50 times per day]
**Time Spent:** [e.g., 6 hours daily]

**Steps:**
1. [Step 1 with system]
2. [Step 2 with system]
3. [Continue...]

**Systems Used:**
- [System 1]: [Purpose]
- [System 2]: [Purpose]

**People Involved:**
- [Role]: [Responsibilities]
- [Role]: [Responsibilities]

### BUSINESS IMPACT
**Direct Costs:**
- [Cost type]: $[Amount]/[period]

**Labor Costs:**
- [Role]: [Hours] × $[Rate] = $[Total]

**Total Annual Impact:** $[Total]

### SUCCESS METRICS
- [Metric 1]: Current [X], Target [Y]
- [Metric 2]: Current [X], Target [Y]

### CONSTRAINTS
**Technical:** [List]
```

```
**Organizational:** [List]
**Timeline:** [Requirements]
```

2.5 AI PROCESSING & ANALYSIS

Same Day After Meeting 1

2.5.1 Upload to Agent Studio (5 minutes)

1. Upload meeting recording or notes
2. Upload any customer documents shared
3. Tag with customer name and opportunity ID
4. Select "Process for Discovery Analysis"

2.5.2 Pre-Sales Workflow Generation Prompt

Use this prompt with Claude/ChatGPT to convert discovery notes into workflows:

```None
# WORKFLOW GENERATION FROM DISCOVERY NOTES

You are an expert workflow designer for FourKites Agent Studio.
Convert the discovery notes below into precise natural language
workflow definitions that can be directly imported into Agent
Studio.

## DISCOVERY NOTES:
[PASTE YOUR DISCOVERY NOTES HERE - can be messy, unstructured, or
conversational]

## CUSTOMER CONTEXT:
- Customer Name: [Customer]
- Industry: [Transportation/Retail/Manufacturing/etc]
- Primary Systems: [TMS/WMS/ERP names]
- Key Pain Points: [Top 3 from discovery]
```

```
- Success Metrics: [What they want to improve]

## GENERATE THE FOLLOWING:

### WORKFLOW 1: [Name will be auto-generated based on process]

**TRIGGER:**
When [specific condition that starts this workflow]

**STEPS:**
1. Check [what system/data]
2. If [condition] then [action]
3. Send notification to [who] with [what information]
4. Wait [time period] for [response/action]
5. If no response, escalate to [who]
6. Update [system] with [status]
7. Log [what] for reporting

**DATA NEEDED:**
- From [System]: [field1, field2, field3]
- From [System]: [field1, field2, field3]

**NOTIFICATIONS:**
- To [Role]: When [condition] via [email/SMS/Slack]
- To [Role]: When [condition] via [email/SMS/Slack]

**BUSINESS RULES:**
- If [amount] > $[threshold] then [action]
- If [time] > [hours] then [action]
- If [location] = [value] then [action]

**SUCCESS METRICS:**
- Reduce [metric] from [current] to [target]
- Improve [metric] from [current] to [target]
- Save [hours/dollars] per [period]
```

```
**EXCEPTIONS TO HANDLE:**
- What if [common exception]
- What if [another exception]
- What if [edge case]

### Please generate all distinct workflows found in the discovery
notes above.

## FORMATTING REQUIREMENTS:
- Use clear "When X then Y" logic
- Specify exact trigger conditions
- Include all decision points
- Note where human approval is needed
- Identify all systems to integrate
- List specific data fields needed
- Define success/failure conditions
- Include escalation paths

## OUTPUT FORMAT:
Provide workflows in natural language that can be directly used
to:
1. Build in Agent Studio visual builder
2. Estimate implementation effort
3. Identify required integrations
4. Calculate ROI
```

QUICK VERSION FOR SIMPLE WORKFLOWS:

```None
# QUICK WORKFLOW GENERATOR

## MY DISCOVERY NOTES:
[Paste everything from discovery call - messy is fine]

## CONVERT TO WORKFLOWS:
```

```
For each process mentioned above, create a workflow with:

TRIGGER: When does it start?
STEPS: What happens (in order)?
SYSTEMS: What needs to connect?
PEOPLE: Who does what?
RULES: What are the conditions?
GOAL: What improves?

Keep it simple but specific. Use "When [X] then [Y]" format.
```

2.5.3 Example: From Notes to Workflow

INPUT - Raw Discovery Notes:

None
```
Talked to Sarah at ABC Corp. They check TMS every morning
at 8am for late shipments. She exports to Excel, filters
for anything over 2 hours late. Then emails each carrier
asking for updates. If shipment is over $50k she also
calls them. Uses old spreadsheet for carrier contacts.
Manager gets involved after 4 hours if no response.
They pay about $15k/month in detention. Want to get
OTIF from 82% to 95%. Process takes 4 hours daily.
```

OUTPUT - Generated Workflow:

None
```
## WORKFLOW 1: Late Shipment Carrier Communication

**TRIGGER:**
When shipment.status = "in_transit"
AND actual_time > planned_time + 2 hours
```

```
Check every 30 minutes, 24/7

**STEPS:**
1. Query TMS for all shipments where delay > 2 hours
2. For each delayed shipment:
   - Retrieve shipment value from order data
   - Lookup assigned carrier from shipment record
   - Get carrier contact from FourKites network
3. If shipment_value > $50,000:
   - Send HIGH PRIORITY email to carrier
   - Send SMS to carrier dispatch
   - Create phone call task for user
4. Else:
   - Send standard delay notification email
5. Wait 4 hours for carrier response
6. If no response received:
   - Escalate to Logistics Manager
   - Send second notice to carrier
   - Flag for executive dashboard
7. When carrier responds:
   - Update new ETA in TMS
   - Notify customer if ETA changed >4 hours
8. Log all communications for reporting

**DATA NEEDED:**
- From TMS: shipment_id, planned_eta, actual_eta, carrier_id,
value
- From OMS: customer_contact, order_priority
- From FourKites: carrier_email, carrier_phone,
carrier_performance

**NOTIFICATIONS:**
- To Carrier: Delay notice via email + SMS for high value
- To Manager: Escalation after 4 hours via email
- To Customer: If new ETA impacts delivery via email
```

```
**BUSINESS RULES:**
- If value > $50,000 then HIGH_PRIORITY
- If delay > 4 hours then ESCALATE
- If carrier_response_rate < 50% then ALWAYS_CALL
- Business hours: 6 AM - 8 PM local time

**SUCCESS METRICS:**
- Reduce detention costs from $15K to $7.5K/month
- Improve OTIF from 82% to 95%
- Reduce manual effort from 4 hours to 30 minutes/day
- Carrier response time < 2 hours

**EXCEPTIONS TO HANDLE:**
- Carrier contact not available → Use FourKites network data
- Multiple delays same carrier → Batch communication
- Weekend/holiday → Adjust escalation timeline
- Customer VIP → Immediate notification
```

2.5.4 AI Processing (Automated - 30 minutes)

None

```
AI PROCESSES THE GENERATED WORKFLOWS AND:
- Validates against available actions
- Identifies integration requirements
- Calculates implementation effort
- Generates visual workflow diagram
- Estimates ROI based on metrics
- Flags any technical constraints
```

2.5.5 Pre-Sales Review (30 minutes)

None

```
REVIEW AI OUTPUT:
- [ ] Validate workflow accuracy against notes
- [ ] Check integration availability
```

```
- [ ] Identify custom requirements (10% rule)
- [ ] Review effort estimate
- [ ] Calculate implementation timeline
- [ ] Prepare ROI model
- [ ] Note clarification questions
- [ ] Build demo script
- [ ] Load workflows into Agent Studio
- [ ] Test demo environment
```

2.5.6 Best Practices for Using the Prompt

DO:

- Include direct quotes from customer
- Capture specific numbers mentioned
- Note all systems named
- List people/roles involved
- Include frustration points
- Add success metrics discussed

DON'T:

- Try to structure notes during meeting
- Worry about complete sentences
- Skip "minor" details
- Clean up before using prompt

PRO TIPS:

1. Record the call (with permission) and use transcript
2. Include customer's exact words for accuracy
3. Note emotional reactions (frustration, excitement)
4. Capture "wishlist" items even if not in scope
5. Mark critical vs nice-to-have requirements

2.5.7 Solution Preparation Checklist

```None
FOR MEETING 2:
```

```
- [ ] Workflow loaded in Agent Studio
- [ ] ROI calculation prepared
- [ ] Implementation timeline created
- [ ] Pricing proposal ready
- [ ] Success stories identified
- [ ] Demo environment tested
- [ ] Meeting agenda sent
```

2.6 MEETING 2: SOLUTION VALIDATION

Duration: 45 minutes

2.6.1 Meeting Structure

Opening & Recap (5 minutes)

```None
"Thank you for joining again. Based on our conversation, I
understood that:
- You spend 6 hours daily on manual tracking
- You're paying $15K/month in detention charges
- Your OTIF needs to improve from 82% to 95%
- Sarah and Tom are overwhelmed with manual work

Did I capture that correctly? Great, let me show you how we solve
this..."
```

Demo: Your Workflow Automated (20 minutes)

The Reveal Moment:

```None
"We've taken your exact process and automated it in Agent Studio.
```

```
This isn't a generic demo - this is YOUR workflow. Let me show
you..."
```

Demo Flow:

```None
TRIGGER POINT:
"Here's where it starts - when a shipment goes 2 hours late,
just like you described..."

AUTOMATION:
"The system automatically pulls from your Blue Yonder TMS..."
"It identifies the right carrier based on your rules..."
"Sends your escalation at your thresholds..."

VALUE POINTS:
"Notice this runs 24/7, not just when Sarah checks at 8 AM"
"Carrier contacts are always current from our network"
"Sarah only sees exceptions that need human decision"

CUSTOMIZATION:
"You can modify these rules anytime"
"Want to change the threshold? Just click here"
"Need different escalation? Simple configuration"
```

Handling Questions:

```None
"Can it handle [specific scenario]?"
→ "Yes, let me show you exactly how..."

"What if we need to change [rule]?"
→ "You can do that yourself right here..."
```

```
"How does it integrate with [system]?"
→ "We have a native connector, updates in real-time..."
```

Gap Analysis (10 minutes)

```None
WHAT'S READY TODAY (70%):
"Most of your workflow uses our standard components:
- ✓ Blue Yonder TMS integration
- ✓ Carrier communication module
- ✓ Escalation engine
- ✓ Notification system
These are pre-built and ready to deploy."

WHAT NEEDS CONFIGURATION (20%):
"Some elements need to be configured for your specific rules:
- Your carrier priority matrix
- Your escalation tiers
- Your email templates
- Your business hours
This takes about 3-5 days."

WHAT'S CUSTOM (10%):
"A few items are unique to you:
- Integration with your proprietary carrier portal
- Your specific rail logic
This requires 3-5 days of custom development."

TIMELINE:
"Total implementation: 3 weeks from contract signing to go-live"
```

ROI Presentation (10 minutes)

```None
INVESTMENT VS. RETURN:
```

```
"Based on your numbers:
Current Annual Cost: $498,000
- Detention: $180,000
- Labor: $78,000
- OTIF penalties: $240,000

Our Solution: $75,000/year
- Platform license: $50,000
- Implementation: $25,000 (one-time)

Net Savings: $423,000 first year
ROI: 5.6x
Payback Period: 2.1 months

CONSERVATIVE ESTIMATE:
"We're assuming only 60% improvement. Most customers see 70-80%."
```

Success Metrics Agreement:

None
```
"We'll track these specific metrics in your dashboard:
1. Detention costs (target: reduce by 50%)
2. OTIF performance (target: achieve 95%)
3. Manual hours (target: reduce by 80%)
4. Carrier response time (target: <30 minutes)

These become our success criteria."
```

Next Steps (5 minutes)

None
```
PATH A: MOVE FORWARD
"It sounds like this solves your challenges. Our typical next
steps:
1. I'll send the proposal today
```

```
2. We'll schedule a technical review with your IT team
3. Upon contract signing, implementation starts immediately
4. You'll be live in 3 weeks"

PATH B: INTERNAL DISCUSSION
"I understand you need to discuss internally. I'll send:
1. Executive summary and ROI analysis
2. Recorded demo of your workflow
3. Reference customer contacts
When should we reconnect?"

PATH C: EXPAND DISCOVERY
"Should we look at other processes while we're at it?
We could automate your [related process] at the same time..."
```

2.7 Discovery Exit Criteria

Required Documentation

```None
MUST HAVE:
✅ Complete process documentation
✅ Systems and integration list
✅ Quantified business impact
✅ Success metrics defined
✅ ROI calculation completed
✅ Workflow validated by customer
✅ Implementation timeline estimated
✅ Pricing prepared

CANNOT PROCEED TO SALES WITHOUT ALL ITEMS
```

Quality Metrics

- Discovery Completeness Score: >90%

- Value Identified: >$100K annual
- Technical Feasibility: Confirmed
- Customer Engagement: High
- Next Meeting Scheduled: Yes

---

3. PHASE 2: SALES & CONTRACTING

3.1 Objective

Convert validated discovery into a clear contract with specific scope, success metrics, and implementation timeline.

3.2 Duration

- Standard: 1-2 weeks
- Enterprise: 2-4 weeks
- Complex/Regulated: 4-8 weeks

3.3 Key Activities

3.3.1 Proposal Development

None

```
PROPOSAL COMPONENTS:
1. Executive Summary
   - Business challenges identified
   - Solution overview
   - Value proposition

2. Solution Details
   - Specific workflows to be automated
   - Integration architecture
   - Implementation approach

3. Success Metrics
```

```
   - Baseline measurements
   - Target improvements
   - Tracking methodology

4. Investment & ROI
   - License fees
   - Implementation services
   - Total cost of ownership
   - ROI calculation
   - Payback period

5. Implementation Timeline
   - Key milestones
   - Resource requirements
   - Go-live date

6. Terms & Conditions
   - Contract length
   - Payment terms
   - SLAs
   - Support included
```

3.3.2 Statement of Work (SOW)

None

```
SOW MUST INCLUDE:

SCOPE:
- [ ] Specific workflows from discovery
- [ ] Integration points defined
- [ ] Custom development itemized
- [ ] Exclusions clearly stated

DELIVERABLES:
- [ ] Configured workflows
```

```
- [ ] Integrations completed
- [ ] VALUE DASHBOARD created
- [ ] Documentation provided
- [ ] Training delivered

SUCCESS CRITERIA:
- [ ] Acceptance test criteria
- [ ] Performance benchmarks
- [ ] Go-live requirements

TIMELINE:
- [ ] Project phases
- [ ] Milestone dates
- [ ] Dependencies
- [ ] Critical path

RESOURCES:
- [ ] FourKites team
- [ ] Customer team
- [ ] Third-party needs
```

3.3.3 Stakeholder Alignment

None

```
TECHNICAL REVIEW (with IT):
- Integration requirements
- Security assessment
- Data governance
- Infrastructure needs

BUSINESS REVIEW (with Sponsor):
- ROI validation
- Success metrics agreement
- Change management plan
- Resource commitment
```

```
PROCUREMENT REVIEW:
- Contract terms
- Payment schedule
- Legal review
- Vendor onboarding
```

3.4 Sales Exit Criteria

```
None
REQUIRED FOR IMPLEMENTATION:
✅ Signed contract with detailed SOW
✅ Success metrics documented and agreed
✅ Implementation team assigned
✅ Customer team identified
✅ Kickoff meeting scheduled
✅ Integration credentials ready
✅ Executive sponsor confirmed

CANNOT START IMPLEMENTATION WITHOUT ALL ITEMS
```

---

4. PHASE 3: IMPLEMENTATION

4.1 Objective

Deploy promised workflows and create value dashboard proving ROI.

4.2 Duration

- Standard: 2-4 weeks
- Complex: 4-8 weeks
- Enterprise: 6-12 weeks

4.3 Implementation Team

- **Implementation Manager** (Lead)
- **Technical Implementation Engineer**
- **Integration Specialist** (as needed)
- **Customer Success Manager** (shadowing for handoff)

4.4 WEEK 1: KICKOFF & SETUP

Day 1: Kickoff Meeting (2 hours)

```None
AGENDA:
1. Introductions & Roles (15 min)
   - FourKites team
   - Customer team
   - RACI matrix

2. Project Overview (30 min)
   - Scope confirmation
   - Success metrics review
   - Timeline walkthrough

3. Technical Planning (45 min)
   - Integration approach
   - Data requirements
   - Security setup

4. Project Governance (20 min)
   - Communication plan
   - Meeting cadence
   - Escalation path

5. Next Steps (10 min)
   - Immediate actions
   - Week 1 deliverables
```

Days 2-3: Technical Setup

```None
ENVIRONMENT SETUP:
- [ ] Create customer tenant
- [ ] Configure user accounts
- [ ] Set up security roles
- [ ] Enable audit logging

INTEGRATION SETUP:
- [ ] Connect to primary TMS
- [ ] Configure WMS connection
- [ ] Set up email gateway
- [ ] Test API connections
- [ ] Validate data flow
```

Days 4-5: Workflow Configuration

```None
BUILD WORKFLOWS:
- [ ] Import from discovery design
- [ ] Configure business rules
- [ ] Set up triggers
- [ ] Define escalation paths
- [ ] Create notifications
- [ ] Enable monitoring

INITIAL TESTING:
- [ ] Test with sample data
- [ ] Verify logic paths
- [ ] Check integrations
- [ ] Document issues
```

4.5 WEEK 2: TESTING & REFINEMENT

Days 1-3: User Acceptance Testing (UAT)

```
None
UAT PROCESS:
1. Test Scenario Planning
   - Normal flow scenarios
   - Exception scenarios
   - Edge cases
   - Performance tests

2. Test Execution
   - Customer team testing
   - Parallel run with current process
   - Issue documentation
   - Resolution tracking

3. Sign-off Process
   - Test results review
   - Issue resolution
   - Customer acceptance
   - Go-live decision
```

Days 4-5: Performance Optimization

```
None
OPTIMIZATION ACTIVITIES:
- [ ] Query performance tuning
- [ ] Notification timing adjustment
- [ ] Rule refinement
- [ ] Error handling improvement
- [ ] Documentation updates
```

4.6 WEEK 3: VALUE DASHBOARD CREATION ⭐

Day 1: Metrics Baseline

```None
BASELINE ESTABLISHMENT:
1. Review Discovery Promises
   - Original pain points
   - Promised improvements
   - Success metrics

2. Gather Historical Data
   - Last 3 months metrics
   - Current performance
   - Trend analysis

3. Define KPIs
   - Primary metrics (from discovery)
   - Secondary metrics
   - Operational metrics
```

Days 2-3: Dashboard Build

```None
DASHBOARD STRUCTURE:

EXECUTIVE SUMMARY TAB:
- Promise vs. Actual (gauge charts)
- Monthly ROI achieved
- Key wins this month
- Alert indicators

BUSINESS METRICS TAB:
- [Customer KPI 1] trend
- [Customer KPI 2] trend
- [Customer KPI 3] trend
- Period-over-period comparison

OPERATIONAL METRICS TAB:
- Workflows executed
```

```
- Success rate
- Exception rate
- Processing time
- System availability

VALUE TRACKING TAB:
- Cost savings (monthly & cumulative)
- Time savings (monthly & cumulative)
- Service improvements
- ROI calculation

DETAILED ANALYTICS TAB:
- Drill-down by location
- Carrier/vendor performance
- Exception analysis
- Root cause tracking
```

Days 4-5: Dashboard Validation

None

```
VALIDATION PROCESS:
1. Data Accuracy Review
   - Verify calculations
   - Check data sources
   - Validate formulas

2. Customer Walkthrough
   - Explain each metric
   - Show drill-down capabilities
   - Demonstrate filtering

3. Training Session
   - How to read dashboard
   - How to export reports
   - How to share insights
```

```
4. Sign-off
   - Customer acceptance
   - Access provisioning
   - Schedule refresh
```

4.7 WEEK 4: TRAINING & HANDOFF

Days 1-2: User Training

None

```
TRAINING CURRICULUM:

ADMIN TRAINING (4 hours):
- Workflow management
- Rule configuration
- User administration
- Dashboard configuration
- Troubleshooting
- Best practices

END USER TRAINING (2 hours):
- Daily operations
- Exception handling
- Dashboard usage
- Report generation
- Support process

POWER USER TRAINING (3 hours):
- Advanced configurations
- Custom rules
- Integration management
- Performance optimization
```

Days 3-4: Documentation & Knowledge Transfer

```None
DOCUMENTATION PACKAGE:
- [ ] Admin Guide
- [ ] User Guide
- [ ] Dashboard Guide
- [ ] Runbooks
- [ ] FAQ Document
- [ ] Support Contacts
- [ ] Escalation Matrix
```

Day 5: GO-LIVE GATE REVIEW 🚨

4.8 MANDATORY IMPLEMENTATION EXIT GATE

Gate Review Meeting Agenda

Duration: 90 minutes Participants: Implementation Manager, Customer Sponsor, CSM

```None
1. WORKFLOW REVIEW (20 min)
   - All workflows deployed
   - UAT results review
   - Performance metrics
   - Issue resolution status

2. VALUE DASHBOARD REVIEW (30 min)
   - Dashboard walkthrough
   - Metrics validation
   - Baseline confirmation
   - ROI tracking setup

3. TRAINING CONFIRMATION (15 min)
   - Training completed
   - Documentation provided
```

```
   - Support process understood

4. HANDOFF PREPARATION (15 min)
   - CSM introduction
   - Transition plan
   - Meeting schedule

5. GATE DECISION (10 min)
   - Checklist review
   - Sign-off ceremony
   - Go-live announcement
```

Gate Checklist

```None
WORKFLOWS:
✅ All workflows deployed and tested
✅ UAT completed and signed off
✅ Performance meets requirements
✅ Documentation complete

VALUE DASHBOARD (MANDATORY):
✅ Dashboard created and accessible
✅ All promised metrics tracking
✅ Baseline data captured
✅ Current performance visible
✅ ROI calculation working
✅ Customer trained on usage
✅ Customer can explain metrics

TRAINING:
✅ All key users trained
✅ Admin users trained
✅ Documentation provided
✅ Support process understood
```

```
HANDOFF:
✅ CSM fully briefed
✅ Customer signs acceptance
✅ Transition meeting scheduled
✅ Success plan created

GATE DECISION:
☐ PASS → Proceed to Customer Success
☐ FAIL → Remain in Implementation
         Address gaps: ________________
         Reschedule review: _____________
```

---

5. PHASE 4: CUSTOMER SUCCESS

5.1 Objective

Drive adoption, optimize value delivery, and identify expansion opportunities.

5.2 Customer Success Manager Role

- Primary relationship owner post-implementation
- Value realization partner
- Expansion opportunity identifier
- Renewal owner

5.3 MONTH 1: TRANSITION & STABILIZATION

Week 1: Handoff from Implementation

```
None
TRANSITION CHECKLIST:
```

```
- [ ] Receive implementation documentation
- [ ] Review value dashboard with customer
- [ ] Understand success metrics
- [ ] Learn customer's business context
- [ ] Set communication cadence
- [ ] Schedule first MBR

IMMEDIATE ACTIONS:
- Daily dashboard monitoring
- Proactive issue detection
- Usage pattern analysis
- Quick win identification
```

Weeks 2-4: Stabilization Focus

None

```
STABILIZATION ACTIVITIES:
- Monitor workflow performance
- Address any issues immediately
- Document success stories
- Build relationship with key users
- Identify optimization opportunities
- Prepare first Monthly Business Review
```

5.4 MONTHS 2-3: OPTIMIZATION

Monthly Business Review (MBR) Structure

Duration: 60 minutes

None

```
AGENDA:
```

```
1. DASHBOARD REVIEW (20 min)
   - Metrics vs. targets
   - Month-over-month trends
   - Success highlights
   - Areas for improvement

2. OPERATIONAL REVIEW (15 min)
   - Workflow performance
   - Exception analysis
   - User adoption metrics
   - Support ticket review

3. OPTIMIZATION OPPORTUNITIES (15 min)
   - Process improvements
   - New scenarios identified
   - Training needs
   - Configuration updates

4. ACTION ITEMS (10 min)
   - Optimization implementation
   - Training schedule
   - Next month focus
   - Success story documentation
```

Optimization Initiatives

None

```
WORKFLOW OPTIMIZATION:
- Reduce exception rates
- Improve processing time
- Add new rules/scenarios
- Expand automation scope

USER ADOPTION:
- Additional training sessions
```

```
- Best practice sharing
- Internal champion development
- Success story socialization
```

5.5 MONTHS 4-6: EXPANSION

Quarterly Business Review (QBR)

Duration: 90 minutes Participants: Include executive sponsor

```None
QBR AGENDA:

1. EXECUTIVE SUMMARY (15 min)
   - Quarter highlights
   - ROI achieved to date
   - Key success stories

2. VALUE DELIVERY (25 min)
   - Dashboard deep dive
   - Cost savings achieved
   - Efficiency improvements
   - Service level improvements

3. OPERATIONAL EXCELLENCE (20 min)
   - System performance
   - User adoption trends
   - Support metrics
   - Benchmark comparisons

4. EXPANSION OPPORTUNITIES (20 min)
   - Additional use cases identified
   - New departments/locations
   - Additional value potential
```

```
   - Investment requirements

5. STRATEGIC PLANNING (10 min)
   - Industry trends
   - Platform roadmap
   - Future vision alignment
   - Next quarter goals
```

Expansion Discovery Process

```None
IDENTIFY OPPORTUNITIES:
1. Analyze current usage patterns
2. Interview users for adjacent pain points
3. Review related processes
4. Calculate additional ROI

BUILD BUSINESS CASE:
1. Document opportunity
2. Quantify value potential
3. Estimate implementation effort
4. Create expansion proposal

PRESENT TO CUSTOMER:
1. Show current success
2. Present expansion opportunity
3. Demonstrate additional value
4. Gain commitment
```

5.6 MONTHS 7-12: VALUE MAXIMIZATION

Ongoing Success Activities

```None
MONTHLY:
- Dashboard review and optimization
- Performance monitoring
- Success story capture
- Usage analysis

QUARTERLY:
- Executive QBR
- Expansion planning
- Renewal preparation
- Reference development

CONTINUOUS:
- Proactive support
- Best practice sharing
- Platform updates
- Industry insights
```

Success Metrics Tracking

```None
ADOPTION METRICS:
- Monthly active users
- Feature utilization
- Dashboard views
- Workflow execution

VALUE METRICS:
- ROI achieved
- Cost savings
- Time savings
- Service improvements

HEALTH METRICS:
- Support tickets
```

```
- User satisfaction
- NPS score
- Engagement level
```

---

6. PHASE 5: RENEWAL & EXPANSION

6.1 Objective

Secure renewal based on proven value and expand footprint.

6.2 Renewal Timeline

90 Days Before Renewal

```None
VALUE DOCUMENTATION:
- [ ] Compile 12-month metrics
- [ ] Calculate total ROI achieved
- [ ] Document success stories
- [ ] Gather testimonials
- [ ] Create value presentation

HEALTH ASSESSMENT:
- [ ] Usage trending analysis
- [ ] Satisfaction scoring
- [ ] Support ticket analysis
- [ ] Engagement evaluation
- [ ] Risk identification
```

60 Days Before Renewal

```None
RENEWAL PROPOSAL:
1. Executive Summary
   - Partnership highlights
   - Value delivered
   - Future vision

2. Value Achievement
   - ROI delivered vs. promised
   - Cost savings achieved
   - Efficiency improvements
   - Service enhancements

3. Usage & Adoption
   - User statistics
   - Feature utilization
   - Platform engagement

4. Expansion Opportunities
   - Additional use cases
   - New departments
   - Enhanced features

5. Renewal Options
   - Standard renewal
   - Expanded scope
   - Multi-year benefits
```

30 Days Before Renewal

```None
CONTRACT FINALIZATION:
- [ ] Terms negotiation
- [ ] Expansion scope agreement
- [ ] Success metrics for next term
- [ ] Contract execution
```

```
- [ ] Renewal celebration
- [ ] Next phase planning
```

---

7. SUPPORTING TOOLS & TEMPLATES

7.1 Discovery Tools

Discovery Guide Template

```
None
# CUSTOMER DISCOVERY GUIDE

## 1. CURRENT PROCESS
"Walk me through how this works today..."
- Triggers
- Steps
- Systems
- People
- Exceptions

## 2. BUSINESS IMPACT
"Help me understand why this matters..."
- Costs
- Time
- Service
- Risk

## 3. DESIRED OUTCOME
"What would perfect look like..."
- Automation
- Visibility
- Control
- Metrics
```

```
## 4. CONSTRAINTS
"What should we keep in mind..."
- Technical
- Organizational
- Timeline
- Scope
```

ROI Calculator Template

```None
CURRENT STATE COSTS:
- Direct costs: $______/year
- Labor costs: $______/year
- Penalty costs: $______/year
- Opportunity costs: $______/year
TOTAL: $______/year

SOLUTION INVESTMENT:
- License: $______/year
- Implementation: $______ (one-time)
- Training: $______ (one-time)
TOTAL: $______

ROI CALCULATION:
- Year 1 Savings: $_______
- ROI: ___x
- Payback: ___ months
```

7.2 Implementation Tools

Project Plan Template

```None
WEEK 1: KICKOFF & SETUP
□ Day 1: Kickoff meeting
□ Day 2-3: Technical setup
□ Day 4-5: Workflow configuration

WEEK 2: TESTING & REFINEMENT
□ Day 1-3: UAT
□ Day 4-5: Optimization

WEEK 3: DASHBOARD CREATION
□ Day 1: Baseline metrics
□ Day 2-3: Build dashboard
□ Day 4-5: Validation

WEEK 4: TRAINING & HANDOFF
□ Day 1-2: Training
□ Day 3-4: Documentation
□ Day 5: Gate review
```

Dashboard Requirements Template

```None
EXECUTIVE METRICS:
- [ ] Metric: _______ (Target: ___)
- [ ] Metric: _______ (Target: ___)

OPERATIONAL METRICS:
- [ ] Workflows executed
- [ ] Success rate
- [ ] Exception rate

VALUE TRACKING:
- [ ] Cost savings
- [ ] Time savings
- [ ] ROI calculation
```

7.3 Customer Success Tools

MBR/QBR Template

```None
MONTHLY BUSINESS REVIEW
Date: _______
Participants: _______

1. METRICS REVIEW
   - Target vs. Actual
   - Trends
   - Insights

2. SUCCESSES
   - Win #1
   - Win #2
   - Win #3

3. CHALLENGES
   - Issue #1 → Action
   - Issue #2 → Action

4. NEXT MONTH
   - Focus areas
   - Goals
   - Support needed
```

Health Score Calculator

```None
USAGE (25%):
□ Daily active users: ___
□ Feature adoption: ___%
□ Dashboard views: ___

VALUE (25%):
```

```
□ ROI achieved: ___%
□ Metrics met: ___%
□ Goals achieved: ___%

ENGAGEMENT (25%):
□ MBR attendance: ___%
□ Support tickets: ___
□ Training completed: ___%

SATISFACTION (25%):
□ NPS score: ___
□ CSAT score: ___/5
□ Renewal likelihood: ___%

OVERALL HEALTH: ___/100
```

---

8. METRICS & KPIs

8.1 Overall Journey Metrics

None

```
EFFICIENCY METRICS:
- Discovery to close: <6 weeks
- Implementation time: <4 weeks
- Time to value: <30 days
- Time to ROI: <90 days

QUALITY METRICS:
- Implementation on-time: >90%
- Dashboard adoption: 100%
- Customer satisfaction: >4.5/5
- Reference-ability: >75%
```

```
BUSINESS METRICS:
- Renewal rate: >95%
- Expansion rate: >120%
- Gross margin: >70%
- NPS score: >50
```

8.2 Phase-Specific KPIs

Pre-Sales KPIs

```None
- Discovery completeness: >90%
- Demo-to-close rate: >40%
- Average deal size: >$100K
- Sales cycle length: <6 weeks
```

Implementation KPIs

```None
- On-time delivery: >90%
- On-budget delivery: >95%
- Customer acceptance: 100%
- Dashboard completion: 100%
```

Customer Success KPIs

```None
- Monthly active usage: >80%
- Value targets achieved: >80%
- Support tickets: <5/month
- Expansion identified: >50%
```

Renewal KPIs

```
None
- 90-day visibility: 100%
- Renewal rate: >95%
- Expansion rate: >120%
- Multi-year contracts: >40%
```

---

9. GOVERNANCE & QUALITY GATES

9.1 Quality Gate Framework

Gate 1: Discovery → Sales

```
None
REQUIREMENTS:
✅ Discovery documentation complete
✅ Workflow validated by customer
✅ ROI calculated and accepted
✅ Technical feasibility confirmed
✅ Implementation timeline agreed

APPROVAL: Pre-Sales Manager
```

Gate 2: Sales → Implementation

```
None
REQUIREMENTS:
✅ Contract signed with SOW
✅ Success metrics documented
✅ Teams identified and ready
✅ Kickoff meeting scheduled
✅ Technical access provided

APPROVAL: Sales Manager
```

Gate 3: Implementation → Customer Success ⭐

```None
REQUIREMENTS:
✅ All workflows live and tested
✅ VALUE DASHBOARD complete
✅ Training delivered
✅ Documentation provided
✅ Customer acceptance signed

APPROVAL: Implementation Manager + Customer
```

Gate 4: Customer Success → Renewal

```None
REQUIREMENTS:
✅ Value documented (12 months)
✅ ROI achieved (>3x)
✅ Health score green
✅ Expansion opportunities identified
✅ Renewal proposal submitted

APPROVAL: Customer Success Manager
```

9.2 Governance Rhythm

Weekly Reviews

```None
MONDAY: Pipeline Review
- New discoveries
- Active implementations
- At-risk accounts

WEDNESDAY: Gate Reviews
- Gate readiness
```

```
- Issue resolution
- Resource planning

FRIDAY: Success Stories
- Win documentation
- Reference development
- Best practice sharing
```

Monthly Reviews

```None
FIRST MONDAY: Metrics Review
- Phase metrics
- Trending analysis
- Action planning

THIRD MONDAY: Process Improvement
- Lesson learned
- Process updates
- Training needs
```

Quarterly Reviews

```None
EXECUTIVE QBR:
- Overall performance
- Strategic initiatives
- Investment priorities
- Market feedback
```

---

10. APPENDICES

Appendix A: Industry-Specific Discovery Guides

Transportation & Logistics

```None
KEY METRICS:
- Detention/demurrage costs
- On-time delivery performance
- Empty miles percentage
- Driver utilization
- Fuel costs

COMMON PAIN POINTS:
- Manual carrier communication
- Lack of shipment visibility
- Reactive issue management
- High detention costs
- Poor OTIF performance

DISCOVERY FOCUS AREAS:
- Carrier management processes
- Exception handling workflows
- Customer communication
- Yard management
- Cross-dock operations
```

Retail & Consumer Goods

```None
KEY METRICS:
- OTIF/OTIF compliance
- Inventory carrying costs
- Stockout frequency
- Order fill rate
- Return processing time

COMMON PAIN POINTS:
```

```
- Retail compliance fines
- Poor inventory visibility
- Manual order tracking
- Seasonal volume spikes
- Returns management

DISCOVERY FOCUS AREAS:
- DC operations
- Store replenishment
- Vendor compliance
- Peak season planning
- Reverse logistics
```

Manufacturing

None
```
KEY METRICS:
- Production line downtime
- Expedite freight costs
- Supplier on-time delivery
- Safety stock levels
- Quality defect rates

COMMON PAIN POINTS:
- Material shortages
- Production delays
- Supplier reliability
- Expedite costs
- Quality issues

DISCOVERY FOCUS AREAS:
- Inbound material flow
- Production planning
- Supplier collaboration
- Quality management
```

```
- Finished goods distribution
```

Appendix B: Common Workflow Templates

Late Shipment Management

```None
TRIGGER: Shipment ETA delayed >2 hours
ACTIONS:
1. Identify affected shipments
2. Determine impact severity
3. Notify relevant parties
4. Track resolution
5. Document root cause

VALUE DRIVERS:
- Reduced detention costs
- Improved OTIF
- Better customer communication
- Proactive issue resolution
```

Appointment Scheduling

```None
TRIGGER: Load ready for pickup/delivery
ACTIONS:
1. Check appointment requirements
2. Find available slots
3. Book appointment
4. Confirm with carrier
5. Send notifications

VALUE DRIVERS:
- Reduced detention
```

```
- Better dock utilization
- Improved carrier relations
- Fewer missed appointments
```

Document Processing

```None
TRIGGER: Document received (POD, BOL, etc.)
ACTIONS:
1. Extract document data
2. Validate completeness
3. Match to shipment
4. Update systems
5. Trigger workflows

VALUE DRIVERS:
- Faster processing
- Fewer errors
- Reduced manual effort
- Improved visibility
```

Appendix C: Change Management Guide

Stakeholder Communication Plan

```None
EXECUTIVES:
- Focus: ROI and strategic value
- Frequency: Monthly/Quarterly
- Format: Dashboard and presentations

MANAGERS:
- Focus: Operational improvements
- Frequency: Weekly/Monthly
```

```
- Format: Reports and reviews

USERS:
- Focus: Daily impact and ease
- Frequency: Daily/Weekly
- Format: Training and support
```

Adoption Strategy

```None
PHASE 1: PILOT (Month 1)
- Select champion users
- Limited scope rollout
- Gather feedback
- Refine approach

PHASE 2: ROLLOUT (Month 2-3)
- Expand user base
- Full functionality
- Continuous training
- Success stories

PHASE 3: OPTIMIZATION (Month 4+)
- Full adoption
- Advanced features
- Best practices
- Continuous improvement
```

Appendix D: Technical Integration Checklist

TMS Integration Requirements

```None
DATA NEEDED:
```

```
- [ ] Load/Shipment details
- [ ] Carrier assignments
- [ ] Appointment times
- [ ] Status updates
- [ ] Reference numbers

INTEGRATION METHOD:
- [ ] API (preferred)
- [ ] EDI
- [ ] File transfer
- [ ] Database connection

SECURITY:
- [ ] Authentication method
- [ ] Data encryption
- [ ] Access controls
- [ ] Audit logging
```

WMS Integration Requirements

None

```
DATA NEEDED:
- [ ] Inventory levels
- [ ] Receipt/Ship confirmations
- [ ] Location updates
- [ ] Order status

INTEGRATION METHOD:
- [ ] Real-time API
- [ ] Batch updates
- [ ] Event triggers

SECURITY:
- [ ] VPN requirements
- [ ] Firewall rules
```

```
- [ ] Data masking
- [ ] Compliance needs
```

CONCLUSION

This playbook represents the complete FourKites Agent Studio customer lifecycle, ensuring:

1. **Deep Discovery** - Understanding before selling
2. **Clear Contracts** - Defined scope and success metrics
3. **Value Delivery** - Mandatory dashboards proving ROI
4. **Continuous Success** - Ongoing optimization and expansion
5. **Data-Driven Renewals** - Proven value for renewal

The key to success is the **mandatory value dashboard gate** - no customer moves to success phase without proven, measurable value delivery.

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---

End of Document