

[Transcript Begins]

Melissa:

Okay, let's get started. Jordan, you're up — pipeline updates?

Jordan:

We closed three new accounts this week. Good momentum overall, though the Baxter & Co. deal is still stalled. Their procurement team is "reviewing internally" — whatever that means. It's been over three weeks.

Melissa:

That's dragging. You've escalated?

Jordan:

Yeah, but I'm getting radio silence. Might be worth asking if Legal can nudge them.

Melissa:

Alright, I'll ping them myself. What else?

Jordan:

Two new inbound leads came through from the trade show. I passed them to SDRs but... not sure if they've followed up. I haven't seen updates in the CRM.

Tanya:

They probably didn't know where to log them — half the team's still confused about the new CRM fields.

Jordan:

We had training for that, though.

Tanya:

Well, some people didn't show up. Not naming names, but... attendance was "optional," apparently.

Melissa:

Let's just make sure everyone watches the recording. And Tanya, can you resend the cheat sheet?

Tanya:

Already did. Twice.

Luis:

On the onboarding front — survey results are in. 48% response rate. Feedback was mostly fine, except one of the enterprise clients said our training materials felt like "death by PDF." Their words.

Jordan:

I told you those slides were way too dense.

Luis:

That wasn't the problem. It's the amount of material, not the format. They felt bombarded right after signing the contract.

Melissa:

Okay, enough. Luis, work with Tanya to slim down the onboarding process by *next Wednesday*. Just show them what they need, not everything we've ever made.

Luis:

Will do.

Dana:

Quick one from me — I'm pulling churn rates by region, and the Northeast is showing some early red flags. I'll need a couple more days to verify.

Melissa:

Keep me posted. Anything else?

Dana:

Yeah, one odd thing — a few clients who churned mentioned they "weren't aware" they had an account manager. Which is... confusing.

Luis:

Wait, what? That's not possible. Everyone gets an intro email.

Jordan:

Maybe they're ignoring it. Or maybe they didn't like the rep. Just saying.

Luis:

We don't have time for speculation, Jordan.

Melissa:

Guys—focus. Luis, please check that those emails are being sent out and not ending up in spam or whatever.

Luis:

On it.

Jordan:

Also — some reps say we're losing renewals because of pricing. Competitors are offering 20% discounts. Clients are starting to bring it up.

Melissa:

Noted. Dana, can you run a quick margin impact model if we match that 20% cut? By *Thursday*, please.

Dana:

Sure. Though if we start slashing prices, we need to be prepared to justify it.

Tanya:

And speaking of justifying things... fulfillment delays are creeping back in. We're still waiting on 37 swag packages from two weeks ago. Some clients are asking if the "welcome kit" is just a myth.

Melissa:

Seriously? Who's handling that?

Tanya:

Technically fulfillment. But they're claiming the request queue "was never finalized." It was. I have the timestamped Slack message.

Melissa:

Alright. I'll take it to Procurement. I'm getting tired of cleaning up after them.

[Transcript Ends]