

Sales Meeting Transcript — ACME x Northwind

Date: October 03, 2025 | Location: Microsoft Teams | Duration: 28 minutes

Attendees: Jordan Lee (AE, Northwind), Priya Nair (SE, Northwind), Alex Chen (IT Ops, ACME), Maria Gomez (Finance, ACME), Samir Patel (Security, ACME)

Agenda: current pains, solution fit, security, commercials, next steps.

[10:00:05] Jordan (AE): Thanks all. In 90 days, what should success look like?

[10:01:10] Alex (IT): Fewer approval delays, predictable SLAs, less tool hopping.

[10:02:20] Priya (SE): We auto-route approvals, log every action, and support SSO/SCIM.

[10:04:00] Samir (Sec): Need SOC 2, DPA, EU residency, and admin audit logs.

[10:05:10] Priya (SE): Covered. Logs stream to your SIEM; EU residency supported.

[10:06:45] Maria (Fin): Clean cost allocation and a small pilot this quarter.

[10:08:00] Jordan (AE): Propose 8-week pilot for two teams; success = <10% rework and 95% SLA hit rate.

[10:09:30] Alex (IT): OK if service desk integration is simple.

[10:10:15] Priya (SE): Prebuilt connector; we'll show it in kickoff.

[10:11:00] Jordan (AE): Risks: change mgmt + timeline. Plan: champions + tight cadence.

Objections: Budget → outcome-based pilot. Security timing → send pack and book slot.
Adoption → champions + short training.

Action Items: Northwind—send security pack (Oct 4); pilot proposal to Maria (Oct 6). ACME—share SSO/SCIM (Oct 7). Both—book review slot (Oct 10).

Next Steps: Kickoff next week; week 1 setup, weeks 2–7 pilot, week 8 ROI readout & expansion decision.