

THE PROMISE

1

What Sales Sold

The scope, promise, and price the customer actually signed for.

2

The Customer's Definition of Success

In their own words — not the contract, not the pitch.

SUCCESS QUESTION

What would wildly successful look like for you?

3

Delivery Commitment

What Delivery believes it's responsible for producing, and on what cadence.

ACCOUNT HEALTH

4

Confidence Trend

Rising, flat, or being spent — and the behavior that tells you which.

5

Current Friction

The request or interaction that's harder than it should be right now.

6

Renewal Risk

Low / Emerging / High — and the one thing driving that rating.

7

Expansion Opportunity

What they've already hinted they need — not what we want to sell.

OWNERSHIP & ACTION

8

Alignment Owner

The one person accountable for keeping promise, expectation, and execution aligned on this account.

9

Next Action

The single move, this week — and who owns it. This is where the meeting ends.