CLIENT SUCCESS OPERATIONS PLAYBOOK

60-90 Day Transformation Plan, Client Ops Architecture, and Cross-Functional Handoff System

Prepared for CoreForce Leadership, Client Success, Support, Product, and Engineering Teams

Area	Definition
Primary Purpose	Create a clear Client Success operating system that improves retention, handoffs, client communication, and cross-functional execution.
Main Operating Model	Client Success owns relationship health, adoption clarity, renewal readiness, and account communication before handoff.
Core Outcome	Move from reactive account management to proactive client partnership and measurable operational accountability.

Operating Principle: No client should be unclear, unmanaged, or silently at risk.

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GUIDE

How to Use This Playbook

This document is designed as both a presentation framework and a working operating manual for the Client Success department.

Recommended Use

- Leadership can use Sections 1-4 to evaluate the proposed operating model.
- Client Success team members can use Sections 5-10 as the daily execution guide.
- Support, Product, and Engineering can use the handoff rules to reduce bottlenecks and clarify ownership.
- Managers can use the cadence, reporting, and KPI sections to inspect progress weekly.

Section	Purpose
1. Current State Diagnosis	Defines the operational gaps causing churn, delay, and cross-functional friction.
2. Target Operating Model	Clarifies how Client Success should function inside the company.
3. Client Ops Link Wheel	Shows the core architecture connecting CS, Product, Support, and Engineering.
4. 60-90 Day Roadmap	Breaks the transformation into clear phases and milestones.
5. Account Manager Role Clarity	Defines what each AM owns and what they do not own.
6. Handoff System	Creates a required handoff flow before Product or Engineering engages.
7. Client Communication System	Establishes primary and secondary contacts, check-ins, and follow-up cadence.
8. Renewal Protection System	Creates 90/60/30-day renewal checkpoints to prevent surprise churn.
9. Reporting and KPIs	Gives leadership measurable visibility into client health and team output.
10. Templates and Checklists	Provides repeatable tools for the team to execute the system.

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SECTION 1

Current State Diagnosis

The issue is not only performance. The larger issue is that the Client Success department does not yet have a clear operating architecture.

Operational Problems Being Solved

- Three account managers currently lack clear leadership, role definition, and accountability structure.
- Cross-functional teams are receiving incomplete or delayed handoffs from Client Success.
- Product teams are being pulled into account management work that should be handled before handoff.
- Clients do not always receive clear timelines, deliverable expectations, or proactive follow-up.
- Renewals are not being tracked early enough, creating surprise churn at the end of the cycle.
- Existing accounts are not being engaged consistently enough to drive adoption, education, and retention.

Problem Area	Likely Business Impact	Playbook Response
No role clarity	Inconsistent performance, duplication, and ownership gaps	Define AM responsibilities, escalation ownership, and weekly accountability rhythm
Weak handoffs	Delayed deliverables and Product/Engineering frustration	Require documented handoff packets before work moves downstream
Poor renewal visibility	Late churn discovery and lost revenue	Install 90/60/30 renewal protection checkpoints
Low client engagement	Lower adoption and weaker product value realization	Create monthly check-ins, QBRs, feature education, and health scoring
Single contact dependency	Communication breakdowns when one contact goes silent	Require primary and secondary client contacts on every account

SECTION 2

Target Operating Model

Client Success should become the relationship and operational bridge between the customer and internal teams.

Client Success Department Mission

- Own the health of the client relationship across onboarding, adoption, engagement, renewal, and escalation recovery.
- Clarify client goals and expectations before work is routed to Product, Support, or Engineering.
- Educate clients on product features, service value, and best practices for adoption.
- Protect renewal outcomes through proactive communication, account reviews, and early risk detection.
- Provide leadership with accurate account visibility through consistent reporting.

Client Success Owns	Client Success Does Not Own
Client relationship health	Building or engineering product functionality
Account communication cadence	Replacing technical support workflows
Client goals, expectations, and timeline clarity	Leaving timeline discovery to Product after handoff

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Client Success Owns	Client Success Does Not Own
Adoption education and product value reinforcement	Waiting until renewal date to discover dissatisfaction
Renewal readiness and churn risk tracking	Allowing clients to go silent without follow-up

SECTION 3

Client Ops Link Wheel Architecture

The Client Ops Link Wheel creates a clean operating bridge between external client needs and internal execution teams.

	Support Issue resolution, troubleshooting, known defects	
Product Product scope, roadmap context, configuration alignment	**Engineering** Technical builds, fixes, technical feasibility	**Client Success** Relationship owner, adoption owner, timeline communicator
	Leadership Priorities, risk visibility, business outcomes	

Link Wheel Rule	Definition
One owner for each account	Client Success owns the client relationship and keeps every internal team aligned.
One source of truth	Account notes, risks, timelines, stakeholders, and next steps must live in a shared client record.
No incomplete handoffs	Product, Support, and Engineering should receive documented context before accepting work.
Weekly visibility	All blockers, delayed deliverables, and risk accounts are reviewed in a cross-functional sync.

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SECTION 4

60-90 Day Transformation Roadmap

The roadmap is designed to stabilize the team first, then build retention systems, then scale operational maturity.

Phase	Days	Primary Goal	Key Actions	Expected Output
Phase 1	1-30	Stabilize and create visibility	Role clarity, account audit, handoff rules, team cadence, risk review	Clear ownership, cleaner communication, known account risks
Phase 2	31-60	Build retention and engagement systems	Health scoring, client check-ins, renewal tracker, adoption reviews	Proactive client management and early churn detection
Phase 3	61-90	Optimize and scale	KPI dashboard, QBR model, process refinement, manager reporting	Repeatable operating system with leadership visibility

PHASE 1

Days 1-30: Stabilize and Create Visibility

First 30-Day Actions

- Meet with each account manager to understand current accounts, obstacles, and workflow habits.
- Complete a full account audit covering account status, client contacts, renewal dates, open issues, and risk level.
- Define the AM role scorecard and clarify daily, weekly, and monthly responsibilities.
- Launch the required handoff packet for all Product, Support, and Engineering requests.
- Begin weekly cross-functional syncs with Support, Product, Engineering, and management peers.
- Create a renewal tracker and identify every account within the next 90 days of renewal.

PHASE 2

Days 31-60: Client Engagement and Retention Systems

Second 30-Day Actions

- Launch client health scoring using Green, Yellow, and Red account statuses.
- Implement monthly client check-ins and adoption conversations for active accounts.
- Require primary and secondary client contacts for every account.
- Create a formal risk recovery workflow for Yellow and Red accounts.
- Begin 90/60/30-day renewal checkpoints for all renewal accounts.
- Standardize client-facing timeline updates so no client is left guessing.

PHASE 3

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Days 61-90: Optimization and Scalability

Final 30-Day Actions

- Review KPI trends across churn risk, renewals, engagement, escalations, and handoff quality.
- Refine handoff workflows based on feedback from Product, Support, and Engineering.
- Build a recurring leadership report showing account health, risks, and upcoming renewals.
- Launch Quarterly Business Review structure for strategic accounts.
- Document final SOPs and make them part of Client Success onboarding and team management.

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SECTION 5

Account Manager Role Clarity

Each account manager needs a clear operating lane so performance can be measured fairly and improved consistently.

AM Responsibility	Required Standard
Client relationship ownership	Know the client goals, stakeholder contacts, product usage needs, and current satisfaction level.
Timeline communication	Confirm expected deliverables, dates, dependencies, and blockers before communicating timelines externally.
Adoption education	Help clients understand features, services, workflows, and product value.
Follow-up management	Document follow-ups, next steps, and response deadlines inside the shared account record.
Renewal protection	Track renewal windows and begin engagement before risk appears.
Escalation coordination	Route issues to the right team with enough context for fast resolution.

Daily AM Habits	Weekly AM Habits	Monthly AM Habits
Review open client follow-ups	Update account health status	Conduct client check-ins
Respond to client needs within SLA	Review blockers with manager	Prepare renewal notes
Document account updates	Attend cross-functional sync	Review adoption and engagement trends
Flag urgent risks	Confirm handoff quality	Identify upsell, education, or risk recovery opportunities

SECTION 6

Client Handoff Flow System

This is the core workflow that reduces bottlenecks and prevents Product, Support, or Engineering from becoming accidental account managers.

Step	Owner	Required Action	Exit Criteria
1. Client discovery	Account Manager	Confirm client goal, business need, product request, and expected outcome.	Goal and outcome documented
2. Stakeholder map	Account Manager	Capture primary contact, secondary contact, decision-maker, and communication preference.	Two contacts documented
3. Scope clarification	Account Manager	Confirm what the client is requesting, what is in scope, and what needs internal review.	Scope notes completed
4. Timeline assessment	Account Manager with internal team	Confirm realistic timeline, dependencies, and blockers before client promise is made.	Timeline approved
5. Handoff packet	Account Manager	Submit internal packet to Product, Support, or	Packet accepted

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Step	Owner	Required Action	Exit Criteria
		Engineering with complete context.	
6. Internal execution	Product/Support/Engineering	Work assigned request based on handoff packet and agreed expectations.	Progress update provided
7. Client update	Account Manager	Communicate status, next steps, and timeline back to client.	Client informed
8. Completion review	Account Manager	Confirm client understanding, satisfaction, adoption, and next action.	Account record updated

Required Handoff Packet Fields

- Client name and account owner
- Primary and secondary client contacts
- Business objective and requested outcome
- Product, Support, or Engineering request type
- Timeline expectations and urgency level
- Known blockers, risks, or client concerns
- Internal owner assigned after acceptance
- Next client communication date

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SECTION 7

Client Communication System

The communication model must reduce silence, missed follow-ups, and single-contact dependency.

Dual Point-of-Contact Strategy

- Every account must have one primary stakeholder and one secondary stakeholder.
- The account record must include two emails and two phone numbers when available.
- The AM should identify the decision-maker, day-to-day manager, and escalation contact.
- If one contact becomes unresponsive, the AM follows the escalation path within the client team.
- This structure protects renewals, implementation progress, and urgent issue resolution.

Communication Moment	Cadence	Purpose	Owner
Onboarding kickoff	Once at start	Confirm goals, stakeholders, expectations, and timeline	AM
Implementation status update	Weekly during active setup	Keep client informed on progress and blockers	AM
Client check-in	Monthly	Review satisfaction, usage, questions, and adoption needs	AM
Risk recovery touchpoint	As needed	Re-engage at-risk or low-response accounts	AM + Manager
QBR	Quarterly for strategic accounts	Review value, outcomes, adoption, and roadmap needs	AM + Manager
Renewal checkpoint	90/60/30 days before renewal	Confirm value, resolve issues, and protect renewal	AM

SECTION 8

Renewal Protection System

Renewals should never be discovered at the finish line. They should be managed as a timeline, not a surprise.

Checkpoint	Timing	Action	Success Signal
Renewal Review 1	90 days before renewal	Review account health, adoption, open issues, stakeholders, and risk level.	Risk level confirmed
Renewal Review 2	60 days before renewal	Hold client value conversation and document questions, friction, or objections.	Client intent clarified
Renewal Review 3	30 days before renewal	Confirm renewal path, final blockers, paperwork, and decision timeline.	Renewal path known
Post-renewal review	After renewal	Confirm satisfaction, next goals, and adoption plan for next cycle.	New cycle plan documented

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Churn Risk Triggers

- Client has not responded after multiple follow-ups.
- Support tickets or escalations increase within a short period.
- Decision-maker is disengaged or replaced.
- Product adoption is low or unclear.
- Client expresses confusion, frustration, or lack of value.
- Renewal is inside 90 days with no active conversation.

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SECTION 9

Reporting, KPIs, and Management Cadence

The new system must be visible. If leadership cannot see risk, adoption, or renewal status, the team is operating in fog.

KPI	What It Shows	Target Behavior
Churn risk count	How many accounts are Yellow or Red	Early risk detection and recovery action
Renewal readiness	How many renewals have 90/60/30 checkpoints completed	No surprise non-renewals
Client engagement rate	How consistently AMs are contacting and meeting with clients	Proactive communication
Handoff acceptance quality	How often Product, Support, or Engineering receives complete context	Reduced internal friction
Open blocker aging	How long client-impacting blockers remain unresolved	Faster escalation and resolution
Adoption activity	Whether clients understand and use the product successfully	Better retention and value realization

Meeting	Frequency	Attendees	Purpose
CS team standup	Weekly	CS Manager + Account Managers	Review accounts, risks, follow-ups, renewals, and blockers
Cross-functional sync	Weekly	CS, Support, Product, Engineering Managers	Review handoffs, escalations, delivery timelines, and risk accounts
Leadership report review	Biweekly or monthly	Director + CS Manager	Review KPIs, churn risks, performance, and improvement plan
Account deep dive	As needed	CS Manager + AM + relevant internal team	Recover Red accounts or resolve complex client blockers

SECTION 10

Templates and Team Checklists

These templates create repeatability and help new team members understand the operating standard quickly.

Template	Required Fields
Account Snapshot	Client name, AM owner, primary contact, secondary contact, renewal date, health status, open issues, next step
Handoff Packet	Client goal, request type, scope, timeline, risks, blockers, internal owner, next client update
Monthly Check-In Notes	Client wins, open questions, adoption status, feature education, risks, next action
Renewal Tracker	Renewal date, decision-maker, health status, last contact date, 90/60/30 checkpoint status
Risk Recovery Plan	Risk reason, account impact, recovery owner, client meeting date, internal action, resolution target

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