

CoreForce

Client Operations Intelligence Architecture

90-Day Strategic Operations Transformation Plan

Prepared & Presented By

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SECTION 1

Executive Summary

- The objective is to modernize Client Success into a proactive operational intelligence function.
- The system connects Account Management, Product, Engineering, Support, and Leadership through shared client context.
- NotebookLM supports structured summaries, searchable account intelligence, and faster meeting preparation.
- The 90-day plan stabilizes current workflows, launches intelligence systems, and scales management visibility.

Core Outcome

Move from fragmented communication to accountable, proactive, cross-functional client operations.

SECTION 2

Current Operational Pain Points

Blind Handoffs

Product and Engineering receive incomplete context.

Reactive Churn Signals

Risk appears late instead of early.

Scattered Notes

Client intelligence lives across disconnected systems.

Overpromising Risk

Technical answers may be given before feasibility review.

Meeting Blind Spots

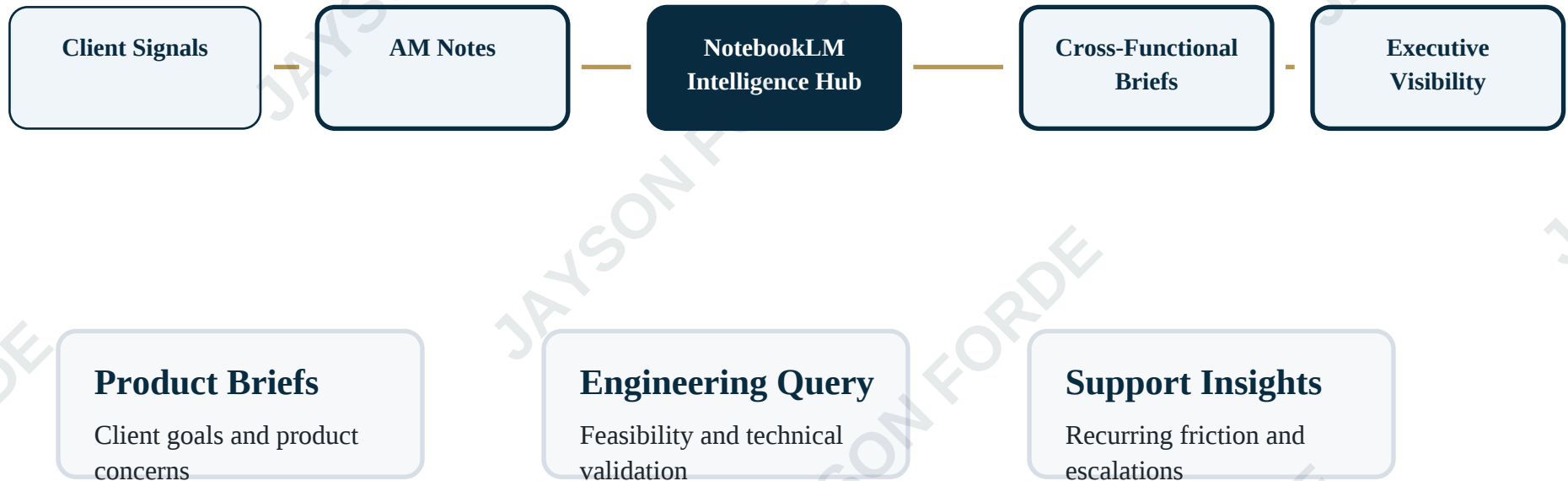
Teams prepare without full client history.

Low Visibility

Leadership lacks clean account and workflow signals.

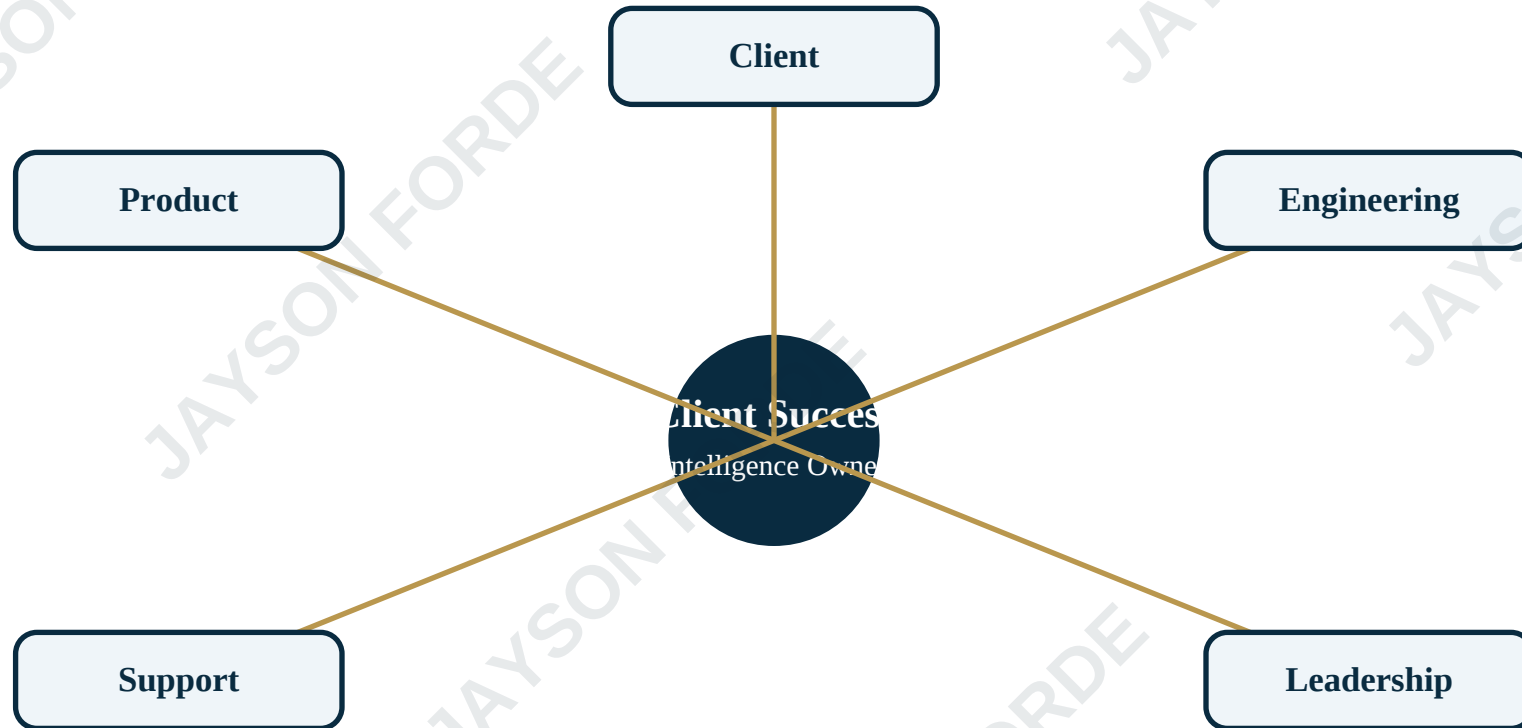
SECTION 3

Client Operations Intelligence Architecture



SECTION 4

Client Ops Link Wheel 2.0



SECTION 5

NotebookLM Intelligence Ecosystem

Folder	Business Use	Primary User
Account Intelligence	Meeting history, goals, contacts, risks, next steps	CS Manager + AMs
Product Briefing	Product concerns, requested outcomes, meeting prep	Product Manager
Engineering Query	Technical asks, impact, urgency, feasibility notes	Engineering
Executive Visibility	Health trends, blockers, renewals, risks	Leadership

SECTION 6

Product Alignment Workflow

Step	Owner	Output
Capture product notes	Account Manager	Client goals and product concerns documented
Generate product brief	AM + NotebookLM	Summary of needs, risks, questions, and meeting goals
Product preparation	Product Manager	Prepared discussion plan with context
Client discussion	Product + AM	Aligned next steps and documented decisions

SECTION 7

Engineering Validation Workflow

Step	Rule	Output
Client asks technical question	Do not promise yes or no	Request captured
Engineering Query created	Context, impact, urgency required	Clean feasibility ticket
Engineering reviews	Async review based on priority	Feasible / Not feasible / Scope needed
AM updates client	Use aligned engineering response	Clear next steps without overpromise

SECTION 8

90-Day Strategic Roadmap

Phase	Days	Focus
Phase 1	1-30	Stabilize workflows, define templates, audit account intelligence
Phase 2	31-60	Launch Product briefs, Engineering queries, health scoring
Phase 3	61-90	Optimize KPIs, executive reporting, SOPs, and scale cadence

SECTION 9

KPI and Management Cadence

KPI	What It Shows	Target Behavior
Product brief completion	Context quality before Product meetings	Reduced blind spots
Engineering query aging	Speed of technical alignment	Clear feasibility response
Churn risk count	Yellow and Red accounts	Early recovery action
Handoff acceptance quality	Complete context to downstream teams	Less internal friction

SECTION 10

Executive Benefits by Department

Client Success

Clearer ownership, stronger follow-up, better renewal visibility.

Product

Better client context before meetings and fewer surprise requests.

Engineering

Protected feasibility review and fewer premature commitments.

Support

Clearer escalation context and recurring issue visibility.

Leadership

Operational visibility into risk, blockers, and client health.

SECTION 11

Closing Vision

- Client Success becomes the operational bridge between customers and internal teams.
- Product, Engineering, and Support receive clearer context before action is required.
- Leadership gains visibility into risk, retention, blockers, and execution quality.
- The organization moves from reactive communication to proactive client intelligence.

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