COREFORCE SALES AND CLIENT SUCCESS COLLABORATION

Client Journey Lifecycle and Collaboration Playbook

From First Contact to Successful Renewal.
A Shared NotebookLM Ecosystem for Sales and Client Success.

PREPARED BY
Jayson Forde
Client Success Operations Strategy and Infrastructure

PRESENTED TO
Sales Manager, Director, and Leadership Team

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SECTION 01

The Proactive vs. Reactive Problem

Why every department is raising the same concern and what the root cause actually is

The same issue has surfaced in every departmental interview across Engineering, Product, Sales, and with the Director: the Client Success team is operating reactively. There is no structured system for proactive client communication, no defined check-in schedule, no SOP for follow-ups, and no client journey map that tracks where a client is in their lifecycle and what the team should be doing at each stage. Clients only hear from the CS team when something is wrong, which means the relationship always starts from a defensive position. This playbook addresses that directly.

No SOP for Client Check-Ins, Follow-Ups, or Proactive Communication

The Client Success team has no documented standard operating procedure for when to contact clients, how often to check in, or how to follow up after issues are resolved. Communication happens reactively, triggered by problems rather than a proactive schedule. For many clients, the only time they hear from their Account Manager is during an escalation or a renewal conversation. That pattern erodes trust over time and leaves clients feeling unsupported and quietly at risk of leaving.

No Client Journey Map or Lifecycle Milestone Tracking

There is no defined client journey map that outlines the stages a client moves through after signing. Without this map, Account Managers have no framework for understanding where each client is in their lifecycle, what concerns are normal at each stage, or what proactive actions should be taken before problems arise. Renewals are being treated as the first relationship checkpoint when they should be the natural outcome of a well-managed journey that began on Day 1.

Sales and CS Operating in Silos After the Close

When a deal closes, there is an unspoken rule that Sales steps back entirely and hands the client to Client Success. The unintended consequence is that the client feels abandoned by the person who earned their trust and brought them onboard. The Sales AE had the first relationship, the first conversations, and the first understanding of what the client is trying to achieve. Cutting that off at the moment of handoff discards one of the most valuable assets the company has: an established, trust-based connection to the client's decision-maker.

Hidden Client Concerns That Never Reach the CS Team

Clients share their real concerns with the person they trust most, which in the early stages is typically the Sales AE who closed the deal. Until CS has had enough time to build its own trust, important feedback and early dissatisfaction signals are being shared with Sales and going nowhere. There is no system for surfacing those insights to the CS team, which means avoidable problems are compounding in silence while the CS team operates without the full picture.

Core Commitment: Client Success will operate proactively with a defined SOP, a journey map, and a structured Sales collaboration system.

SECTION 02

The 130-Day Client Journey Lifecycle   Part 1

Days 1 through 90: Onboarding, Early Adoption, and the Sales AE undercover relationship check-in window

The 130-day lifecycle is the structured framework for the first two quarters of every new client relationship. It is intentionally designed in two parts. The first 90 days cover the highest-risk window in any client relationship: onboarding and early adoption. During this period, the Sales Account Executive maintains a defined undercover check-in role, surfacing concerns the client may not yet share with the CS team while CS builds its own trust independently. This design creates a coordinated safety net without either team stepping on the other.

Days 1-30 Onboarding	Days 31-60 Early Adoption	Days 61-90 Deep Adoption

Stage 1: Onboarding

Days 1 to 30

SALES AE: Active and present. The Sales AE joins the kickoff call personally and makes the introduction to the CS team. The client does not feel handed off. They feel expanded into a coordinated team. The CS AM takes the lead from this point forward, but the Sales AE remains a visible, supportive presence in the background.

MILESTONES

- Kickoff call completed. Sales AE present for introduction.
- Client goals and success criteria documented in NotebookLM.
- Primary and secondary contacts confirmed and recorded.
- Implementation timeline set and communicated to client.
- 30-day Sales AE check-in call scheduled before kickoff ends.
- AM opens first account notes folder in shared NotebookLM.

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Stage 2: Early Adoption

Days 31 to 60

SALES AE: Undercover check-in. At Day 30, the Sales AE reaches out personally to the client decision-maker for an informal relationship check-in. This is a warm, trusted conversation. The AE listens for what the client is not yet comfortable saying to CS. Every concern surfaced is documented in the shared NotebookLM folder within 24 hours so the CS team can address it proactively before it grows.

MILESTONES

- AM conducts product adoption review at Day 45.
- 30-day Sales AE check-in completed. Notes in NotebookLM.
- CS Manager reviews Sales notes before next AM client call.
- Any concerns surfaced by Sales addressed by CS within 48 hours.
- Client health score updated in Notion at Day 45.
- 60-day Sales AE check-in call scheduled.

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Stage 3: Deep Adoption

Days 61 to 90

SALES AE: 60 and 90-day undercover check-ins. By Day 60, the client has real opinions about the product and the support they are receiving. The Sales AE listens for value realization, unmet expectations, and emerging needs. The 90-day call is the final structured Sales check-in of the first quarter, after which CS takes full ownership of the primary relationship as trust has been established.

MILESTONES

- 60-day Sales AE check-in completed. Notes shared in NotebookLM.
- AM conducts mid-cycle adoption and engagement review.
- Feature education session conducted if adoption gaps exist.
- 90-day Sales AE check-in completed. Joint CS and Sales debrief.
- Formal health classification agreed: Green, Yellow, or Red.
- Primary relationship ownership formally transitions to CS Manager.

Sales AE Role in Days 1-90: Kickoff presence, 30-day, 60-day, and 90-day undercover check-ins. All insights shared in shared NotebookLM within 24 hours.

SECTION 02 (CONTINUED)

The 130-Day Client Journey Lifecycle   Part 2

Days 91 through 130 and beyond: CS takes full ownership while Sales steps back to focus on new intake

Days 91 through 130 mark the transition point in the client journey. The Sales AE's structured check-in role has concluded. The CS team has had four months to build its own trusted relationship with the client. By Day 130, the client should feel fully supported by CS, and CS should have a complete picture of the client's health, goals, and any concerns. From this point forward, Sales steps back to focus entirely on new client intake, and CS takes full, uninterrupted ownership of the relationship through to renewal. Sales remains available as a resource if a specific relationship situation warrants their involvement, but that is the exception, not the rule.

Days 91-130 CS Full Ownership	Month 5-6 Engagement and QBR	Month 7+ Renewal Preparation

Stage 4: CS Full Ownership

Days 91 to 130

CS ONLY. Sales AE steps back completely. The CS team has had 90 days to build its own relationship and should now be the client's primary and trusted point of contact. The AM continues regular monthly check-ins, proactive feature education, and health monitoring. Sales is not contacted by the client unless they choose to reach out independently, and any such contact is looped back to the CS Manager within 24 hours.

MILESTONES

- Monthly AM check-in calls continue on a defined schedule.
- Product adoption review completed and documented in NotebookLM.
- Feature education conducted based on usage data and gaps.
- Client health score reviewed and updated in Notion.
- Any Sales AE outreach from client looped to CS Manager within 24hrs.
- Sales formally transitions focus to new client intake.

Stage 5: Active Engagement and QBR

Months 5 to 6

CS ONLY. The relationship is established and the AM shifts from onboarding-mode to strategic partnership. The Quarterly Business Review at Month 6 is the landmark milestone of this stage. It is a structured session where the AM presents the value the client has received, reviews their original goals, surfaces any gaps, and begins planting the seeds of the renewal narrative. By the end of Month 6, the client should be able to clearly articulate why they are staying.

MILESTONES

- Monthly check-in calls maintained throughout Months 5 and 6.
- Quarterly Business Review scheduled and completed at Month 6.
- Client's value narrative confirmed and documented.
- Any product gaps surfaced to PM via Feature Request Log.
- Renewal risk assessment initiated. Health score reviewed.
- Upsell and expansion opportunities identified and logged.

Stage 6: Renewal Preparation

Month 7 onward

CS OWNS THE RENEWAL. Starting at Month 7, the 90-60-30 day renewal checkpoint system is active. The CS Manager owns the renewal conversation entirely. The client should already feel confident in their decision to stay before anyone formally asks for the signature. The Sales AE is notified of the renewal outcome and re-engages only for expansion or upsell conversations that emerge from a successful renewal.

MILESTONES

- 90-day renewal risk review completed and shared with PM.
- 60-day client value conversation conducted with decision-maker.
- 30-day renewal path confirmed. All blockers resolved.
- Renewal paperwork initiated with appropriate stakeholders.
- Post-renewal plan documented for next lifecycle cycle.
- Sales AE notified of outcome. Expansion opportunities flagged.

The 130-Day Outcome: A client who is healthy, engaged, and relationship-invested at Day 130 is a client who renews at Month 11 without hesitation.

SECTION 03

The 30-60-90 Day Sales Check-In System

How Sales and CS collaborate in the early journey to protect the client relationship and surface hidden concerns

During the first 90 days, clients are more likely to share honest concerns with the Sales Account Executive they already trust than with the CS team still building that relationship. This system captures those insights and routes them to CS immediately so nothing valuable goes unheard and no concern grows in silence.

30-Day Check-In

Sales Account Executive

The Purpose

The 30-day check-in is the first formal touchpoint after the client has started using the product in their real environment. The Sales AE reaches out personally to the client decision-maker they built the relationship with during the sales process. The tone of this conversation is warm and relational, not transactional. The AE is checking in as a trusted advisor, not as a salesperson. They are listening for early signals: Is the onboarding going smoothly? Are there any frustrations that have not been raised yet? Does the client feel supported by the CS team? Is the product delivering on the expectations set during the sale?

What Sales AE Shares with CS After the Call

- Overall client sentiment and mood at Day 30
- Any concerns or frustrations the client raised directly
- Any unmet expectations from the sales process
- Product questions the client has that CS should address proactively
- The client's confidence level in the relationship so far

60-Day Check-In

Sales Account Executive

The Purpose

By Day 60, the client has had enough time to form real opinions about the product and the support they are receiving. The 60-day check-in is a deeper conversation that focuses on adoption and value realization. The Sales AE is listening for whether the client can articulate the value they are getting, whether they feel their goals from the sales conversation are being met, and whether any new needs or use cases have emerged that the CS team should know about. This is also the moment where a client might share concerns they have not raised with their Account Manager yet, because the trust with the AE is higher.

What Sales AE Shares with CS After the Call

- Whether the client can articulate the value they are receiving
- Any new use cases or needs that have emerged since onboarding
- Concerns or friction points the client has not raised with the AM
- The client's confidence in their decision to purchase at Day 60
- Any stakeholder changes or relationship dynamics CS should know about

90-Day Check-In

Sales AE and CS Manager Joint Review

The Purpose

The 90-day check-in is the transition point. By this stage, the CS team should have established enough of its own relationship with the client that the Sales AE's formal check-in cadence transitions from monthly to quarterly. The 90-day call is a joint review where both the Sales AE and the CS Manager reflect on the first 90 days together. The client feels the continuity of both relationships being honored. The CS team gets a complete picture of the client's early journey experience. And the Sales AE formally transitions primary relationship ownership to CS while remaining an available resource the client can reach if needed.

What the Joint Review Produces

- A complete 90-day client experience summary in NotebookLM
- Any unresolved concerns from the first 90 days with an action plan
- A formal health classification: Green, Yellow, or Red
- A clear transition of primary ownership to the CS Manager
- A defined ongoing Sales AE touchpoint cadence for the next cycle

SECTION 04

The Shared NotebookLM Ecosystem

How Sales and Client Success share a single organized intelligence source to serve the client together

The shared NotebookLM ecosystem transforms the Sales-to-CS collaboration into a structured, searchable, always-current intelligence resource. Both the Sales AE and the Account Manager contribute to the same client folder in NotebookLM. Both teams can read what the other is hearing from the client. Neither team is operating with incomplete information. The left hand always knows what the right hand is communicating, and the client never feels like they are repeating themselves or starting over.

What Each Team Contributes to the Shared NotebookLM Client Folder

SALES ACCOUNT EXECUTIVE CONTRIBUTES

What CS can see from Sales

30-Day Check-In Summary

After every check-in call, the Sales AE adds a structured note to the shared NotebookLM folder covering client sentiment, concerns raised, unmet expectations surfaced, and overall relationship health at that point in the journey.

Client Relationship Brief at Handoff

The Sales AE adds a one-time brief documenting the client's decision-makers, reasons they chose CoreForce, promises made during the sale, primary goals, and any sensitivities the CS team should know before the first call.

Confidential Concerns from Sales Conversations

When a client shares something with the Sales AE they have not raised with CS, the AE documents it in NotebookLM within 24 hours. The CS Manager reviews this before the next client call so the concern can be addressed proactively.

60 and 90-Day Milestone Updates

At each Sales AE checkpoint, a milestone update is added documenting the client's progress, confidence level, and any evolving needs. These notes become part of the permanent account record CS references for the lifetime of the client.

CLIENT SUCCESS TEAM CONTRIBUTES

What Sales can see from CS

Onboarding and Adoption Progress Notes

The CS team documents onboarding progress, adoption milestones, product usage patterns, and friction points from the first 90 days. Sales reviews these before check-in calls so their conversations are informed by what CS is already seeing on the ground.

Monthly Client Health Score and Status

Each month the CS Manager updates the client's classification in NotebookLM: Green (healthy and engaged), Yellow (at-risk), or Red (immediate intervention needed). Sales is notified of any Yellow or Red so they can consider whether an AE touchpoint would help stabilize the account.

Client Questions, Concerns, and Feature Requests

Every question, concern, and feature request a client raises with the AM is documented in the shared folder under organized categories. Sales sees the full picture of what the client is asking for, enabling more informed check-in conversations.

Renewal Risk Flags and Account Intelligence

When CS identifies renewal risk or an unresolved issue, it is documented with the risk driver and current action plan. Sales reviews these flags before the 90-day

Core Outcome: Sales and CS share one organized picture of every client. Neither team is ever operating without the full story.

SECTION 05

Sales and CS Collaboration Rules   Part 1

Clear guidelines that protect the client relationship, respect both teams, and eliminate the unspoken tension

The tension between Sales and Client Success after the close is real and it exists at CoreForce. Sales feels cut off from clients they worked hard to win. CS feels like Sales stepping in undermines their authority. And clients feel the awkwardness of both. These collaboration rules are not about drawing territory lines. They are about designing a system where both teams play a defined role in the client's success, where handoffs are clean and confident, and where the client always feels like they have a coordinated team behind them rather than two groups trying to figure out who is in charge.

Sales Does Not Replace CS CS Does Not Exclude Sales

The Sales Account Executive is not the ongoing relationship manager after the close. That responsibility belongs to the Client Success team. However, Sales is not cut off from the client either. The Sales AE maintains a structured, defined touchpoint role through the 30-60-90 day check-in system. Outside of those structured check-ins, the Sales AE does not initiate contact with the client without first notifying the CS Manager. This protects the CS team's authority while keeping the Sales relationship active and the client feeling continuously supported by both sides.

The CS Manager Is the Single Communication Authority After Handoff

After the onboarding kickoff, all primary client communications are owned by the Account Manager and CS Manager. If a client reaches out to their Sales AE directly outside of the structured check-in schedule, the AE acknowledges the client warmly, addresses any immediate concerns if appropriate, and then loops in the AM within 24 hours. The Sales AE does not make commitments, discuss contracts, or open new commercial conversations with an existing client without involving the CS Manager first. This single-authority model prevents conflicting messages and builds consistent trust in the CS team as the client's primary operational partner.

Sales and CS Collaboration Rules   Part 2

The remaining operating boundaries that keep both teams aligned and the client experience seamless

The following two rules address the two most common failure points in Sales-to-CS collaboration: slow escalation of client concerns, and misaligned communication. Both rules are designed to protect the client experience first and team boundaries second.

Concerns Surface Immediately Not at the Next Scheduled Meeting

If the Sales AE hears anything during a check-in call that suggests the client is at risk, dissatisfied, or considering leaving, that concern is communicated to the CS Manager within 24 hours, not at the next scheduled review. The CS Manager decides the appropriate response. Speed matters in early-stage client dissatisfaction. A concern that surfaces at Day 32 and reaches the CS team at Day 60 is a concern that had 28 days to grow unchecked. The shared NotebookLM note is updated the same day the concern is surfaced, and the CS Manager reviews it before the next client interaction. There is no acceptable reason to hold a concern until a scheduled meeting when it can be addressed the same day it is identified.

Neither Team Speaks for the Other Without Alignment

The Sales AE does not tell a client that the CS team will do something, and the CS team does not tell a client what Sales promised them without verifying it first. All commitments made to the client during the sales process are documented in the NotebookLM relationship brief at handoff. If there is ever a discrepancy between what Sales promised and what CS is delivering, the CS Manager and Sales Manager resolve it internally before any communication goes to the client. The client should always experience one coordinated, consistent voice from CoreForce, not two teams managing separate narratives about the same relationship.

Renewal Impact Strategy

How the 30-60-90 day system and shared intelligence ecosystem directly increase renewal success by Month 7

Every element of this playbook is designed with one commercial outcome in mind: a successful renewal. The connection between a proactive first-90-days client experience and renewal success at Month 11 or 12 is not abstract. It is direct and measurable. Clients who feel seen, supported, and heard in their first three months are significantly more likely to renew. Clients who experience silence, confusion, or the feeling of being handed off and forgotten are the clients who arrive at the renewal conversation already looking for alternatives. This playbook closes that gap.

How the First 90 Days Determine the Month 11 Renewal

Days 1 to 30
Onboarding Trust

The Sales AE joins the kickoff and introduces the CS team personally. The client does not feel handed off. They feel expanded into a team that is coordinated and prepared. The CS team already knows the client's goals because they were documented in NotebookLM at handoff. The first impression of the CS relationship is one of preparation and continuity.

Client Outcome: Trust in the transition. Confidence in the team.

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Days 31 to 90
Early Signal Capture

The Sales AE check-ins at Day 30 and Day 60 surface concerns that the client has not yet raised with the CS team. Those concerns are shared in NotebookLM within 24 hours. The AM addresses them proactively before they become escalations. The client experiences the company as attentive and responsive, even to concerns they did not formally raise.

Client Outcome: Feeling heard. Problems resolved before they compound.

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Months 4 to 6
Engagement and Value

With early concerns addressed and trust established, the CS team shifts to strategic engagement. Monthly check-ins, feature education, and the QBR at Month 6 reinforce the value the client is receiving. The client can articulate why they chose CoreForce and what results they are getting. They are invested in the relationship.

Client Outcome: Clear value narrative. Investment in the partnership.

Measurable Targets This System Is Designed to Hit

RENEWAL RATE

Baseline plus 15% by end of first full cycle

The combination of proactive check-ins, early concern capture, and structured renewal preparation targets a meaningful improvement over the current renewal baseline.

CLIENT HEALTH AT DAY 90

80% of new accounts classified Green

By the end of the 30-60-90 day system, 80% of new accounts should be classified Green in Notion, indicating a healthy, engaged, and confident client relationship.

CONCERNS SURFACED PROACTIVELY

70% of issues identified before escalation

The shared NotebookLM system and Sales check-ins should surface the majority of client concerns before they escalate to formal tickets or relationship risk events.

SALES-TO-CS HANDOFF QUALITY

100% of new accounts with complete NotebookLM brief

Every new client account should arrive in the CS team's hands with a complete relationship brief from Sales documented in NotebookLM before the kickoff call.

SECTION 07

90-Day Implementation Roadmap

How this collaboration system launches across Sales and CS with clear milestones and accountable owners

Implementing this playbook does not require a major organizational change. It requires three things: a shared commitment from Sales and CS leadership to work together, a structured setup of the shared NotebookLM ecosystem, and a consistent execution of the 30-60-90 day check-in cadence for every new client going forward. The 90-day roadmap below phases the launch to minimize disruption and build confidence in the system before it is applied to the full client base.

PHASE 1 Days 1 to 30

Foundation and Alignment

Align Sales and CS on the collaboration model, set up the shared NotebookLM ecosystem, and launch the system for all new clients signed after Day 1. Existing high-risk accounts are prioritized for the 30-60-90 check-in system retroactively.

MILESTONES

WEEK 1

Leadership Alignment Session

Sales Manager and CS Manager meet to review the playbook, agree on the collaboration rules, and confirm the NotebookLM folder structure for new client accounts. Sales AEs are briefed on the check-in system and their role.

WEEK 2

NotebookLM Ecosystem Setup

Shared client folders are configured in NotebookLM for all active accounts. Sales AEs complete the relationship brief for any existing accounts in the first 90 days of their lifecycle. CS team begins reading and incorporating Sales notes.

WEEKS 3 TO 4

First Check-Ins for New Clients

Any client signed in the last 30 days receives their first Sales AE check-in call. Notes are documented in NotebookLM. CS Manager reviews and updates account health scores. First joint status brief delivered to Sales and CS leadership.

PHASE 2 Days 31 to 60

Cadence and Calibration

The 30-60-90 check-in cadence is fully operational for all new clients. The shared NotebookLM ecosystem is active and both teams are contributing. The first cases where Sales intelligence surfaced a concern the CS team was not aware of are documented as proof points for the value of the system.

MILESTONES

WEEK 5 TO 6

60-Day Check-Ins Active

Sales AEs conduct 60-day check-in calls for all clients who completed their 30-day check-in. Notes are added to NotebookLM within 24 hours. CS Manager reviews before the next scheduled AM check-in call.

WEEK 7

Mid-Point Review

Sales Manager and CS Manager review the system together: How many check-ins completed? How many concerns surfaced through Sales that CS was not aware of? What adjustments are needed to the note format or check-in structure?

WEEK 8

Retroactive Application to At-Risk Accounts

Any existing account classified Yellow or Red is reviewed for whether a Sales AE check-in could help stabilize the relationship. CS Manager and Sales Manager agree on which accounts benefit from a Sales touchpoint.

PHASE 3 Days 61 to 90

Scale and Prove ROI

The system is fully operational and producing measurable outcomes. The 90-day joint review calls begin for clients who entered the system in Phase 1. Leadership receives a 90-day impact report showing the connection between the check-in system and client health improvements.

MILESTONES

WEEKS 9 TO 10

First 90-Day Joint Reviews

Sales AE and CS Manager conduct the first formal 90-day joint review calls for clients who entered the check-in system in Week 1. Formal health classifications confirmed. Primary ownership transitions documented in NotebookLM.

WEEK 11

Renewal Pipeline Review

CS Manager and Sales Manager review the renewal pipeline together: Which accounts in the 90-day window had the full check-in system applied? How does their health score compare to accounts that did not go through the system?

WEEK 12

90-Day Executive Presentation

CS Manager presents the impact report to leadership: client health improvements, concerns surfaced proactively versus reactively, renewal pipeline health, and the proposal to make this system the permanent operating standard.

The client does not belong to Sales or to Client Success. The client belongs to the company. We win renewals as a village.

When Sales and CS share intelligence, share check-ins, and share accountability for the client experience, renewals become the natural outcome of a well-run journey.

Proactive Client Experience
Check-ins before problems arise. Clients who feel seen from Day 1.

Shared Intelligence
One NotebookLM ecosystem. No concern goes unheard.

Renewal by Month 7
A healthy client at 90 days is a renewal by Month 11.

Jayson Forde
Client Success Operations Strategy and Infrastructure
CoreForce   Manager of Customer Success Candidate