

CoreForce Client Operations Intelligence Architecture

90-Day Strategic Operations Transformation Plan

Area	Definition
Primary Purpose	Create a centralized client intelligence operating system that improves handoffs, product alignment, engineering validation, client communication, and retention visibility.
Main Operating Model	Client Success owns relationship intelligence, client context, meeting notes, renewal signals, and cross-functional readiness before Product, Support, or Engineering engagement.
Core Outcome	Move from fragmented communication to proactive operational intelligence with accountable workflows and executive visibility.
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Operating Principle

No client request should move between departments without clear context, ownership, feasibility visibility, and documented next steps.

GUIDE

How to Use This Intelligence Playbook

This document is designed as both an executive presentation framework and a working operating manual for Client Success, Product, Engineering, Support, and leadership stakeholders.

- Leadership can use Sections 1-4 to evaluate the operating model and business case.
- Client Success can use Sections 5-9 as the daily execution and coordination guide.
- Product and Engineering can use the workflow sections to reduce blind handoffs and protect technical decision-making.
- Managers can use the cadence, KPI, and reporting sections to inspect progress weekly.

Section	Purpose
1. Current State Diagnosis	Defines the communication, handoff, and intelligence gaps creating operational friction.
2. Target Operating Model	Clarifies how Client Success becomes the relationship and intelligence bridge.
3. Client Ops Link Wheel 2.0	Shows how CS, Product, Engineering, Support, and Leadership connect through shared context.
4. Client Intelligence Hub	Explains the NotebookLM ecosystem and source-of-truth structure.
5. Product Alignment Workflow	Creates a pre-meeting product briefing system from AM notes and client goals.
6. Engineering Validation Workflow	Prevents premature commitments and formalizes feasibility review.
7. 90-Day Roadmap	Breaks implementation into clear phases and executive milestones.
8. KPI and Cadence System	Gives leadership measurable visibility into adoption, churn risk, handoffs, and responsiveness.
9. Templates and Checklists	Provides repeatable tools for AMs and cross-functional partners.

SECTION 1

Current State Diagnosis

The issue is not only team performance. The larger issue is fragmented operational intelligence. Client context is not consistently captured, summarized, routed, or converted into actionable internal alignment.

Operational Problems Being Solved

- Account Management, Product, Engineering, and Support are not always operating from the same client context.
- Product may enter client conversations without full visibility into client goals, expectations, concerns, or previous AM discussions.
- Engineering may receive feature or technical questions after expectations have already been shaped with the client.
- Client meeting notes and product concerns may live across emails, calls, personal notes, and disconnected systems.
- Renewal risk and client frustration may surface too late because communication is reactive instead of intelligence-led.
- Departments are forced to fill gaps that should have been clarified before handoff.

Problem Area	Likely Business Impact	Intelligence Architecture Response
Fragmented client notes	Teams prepare from incomplete context	Create centralized AI-summarized account intelligence folders
Blind product handoffs	Product meetings start with knowledge gaps	Require product briefing packets before Product engagement
Premature technical commitments	Engineering frustration, client expectation risk	Install Engineering Query Validation before yes/no responses
Low renewal visibility	Surprise churn and delayed recovery	Connect health signals, check-ins, and renewal checkpoints
Weak institutional memory	Knowledge leaves with individuals or disappears in message threads	Build searchable operational memory through structured notes and summaries

SECTION 2

Target Operating Model

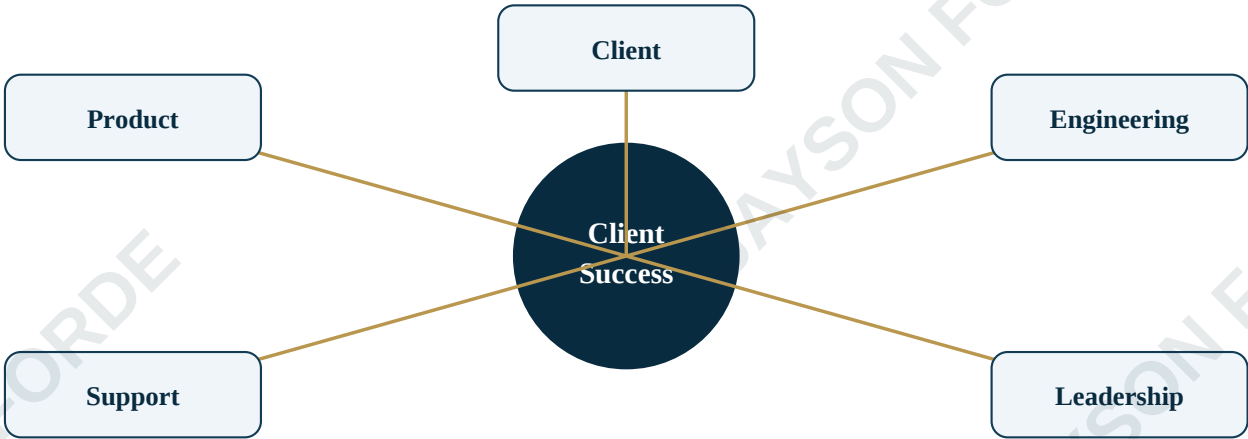
Client Success should operate as the relationship and operational intelligence bridge between the customer and internal execution teams.

Client Success Owns	Client Success Does Not Own
Client relationship health, account context, stakeholder mapping, and communication cadence	Building or engineering product functionality
Capturing product concerns and converting them into structured briefs	Making technical feasibility commitments without Engineering review
Preparing Product, Support, and Engineering with complete client intelligence	Leaving internal teams to discover client goals during handoff meetings
Renewal readiness, risk signals, and proactive client follow-up	Waiting until renewal deadline to discover dissatisfaction

SECTION 3

Client Ops Link Wheel 2.0 Architecture

The Client Ops Link Wheel connects external client needs to internal execution teams through one shared intelligence layer.

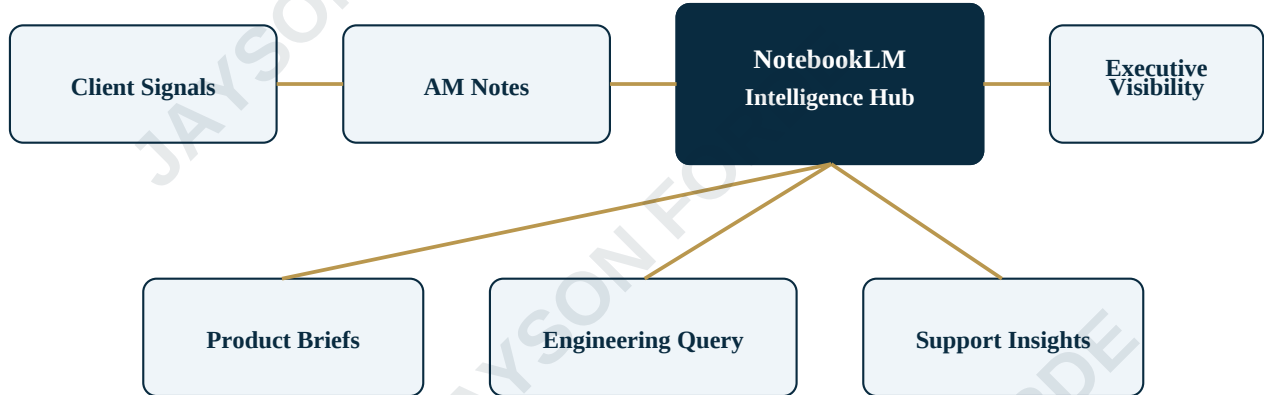


Link Wheel Rule	Definition
One relationship owner	Client Success owns client communication, account context, and relationship health.
One intelligence hub	Client notes, risks, product concerns, technical questions, and next steps live in a searchable system.
No blind handoffs	Product, Engineering, and Support receive documented context before accepting or preparing for client engagement.
Weekly visibility	Blocked requests, delayed answers, risk accounts, and upcoming renewals are reviewed in cadence.

SECTION 4

Client Intelligence Hub - NotebookLM Ecosystem

NotebookLM is positioned as the intelligence layer, not a replacement for CRM, ticketing, Product, or Engineering systems. Its role is to convert scattered notes into clean operational summaries that departments can use quickly.



Intelligence Folder	Contents	Primary User
Account Intelligence Folder	Meeting notes, stakeholder map, renewal status, client goals, open risks	Client Success Manager + AMs
Product Briefing Folder	Product concerns, requested outcomes, feature questions, usage goals, meeting prep summary	Product Manager
Engineering Query Folder	Technical questions, feasibility requests, client impact, urgency, dependencies	Engineering
Support Insight Folder	Recurring issues, ticket patterns, escalation notes, known defects, client frustration themes	Support + CS
Executive Visibility Folder	Health trends, blocked accounts, risk themes, renewal forecast, cross-functional gaps	Director + Managers

Important Positioning

The system should be communicated as an operational visibility and decision-support layer. AI is the engine under the hood. The business value is better preparedness, faster alignment, cleaner handoffs, and stronger retention visibility.

SECTION 5

Product Communication and Alignment Workflow

The Product team should not be surprised by client questions, product concerns, or account expectations. Account Management should prepare Product before introduction, strategy, or roadmap conversations.

Step	Owner	Required Action	Exit Criteria
1. Capture product notes	Account Manager	Document product questions, concerns, goals, current usage, and desired outcomes from client meetings.	Notes stored in account folder
2. Generate product brief	AM + NotebookLM	Summarize key client goals, product expectations, risks, timeline pressure, and relevant history.	Brief created and reviewed
3. Product preparation	Product Manager	Review summary before client meeting and define discovery goals, talking points, and internal questions.	Meeting plan prepared
4. Aligned client discussion	Product + AM	Meet with the client using shared context and clarify expectations without blind spots.	Client expectations documented
5. Post-meeting update	AM + Product	Update account record with decisions, next steps, open questions, and owner assignments.	Next steps visible to all parties

Required Product Brief Fields

Client name, AM owner, product area, business goal, feature/service concern, current workflow pain, desired outcome, urgency level, prior communication history, open questions, next meeting goal

SECTION 6

Engineering Validation Workflow

Engineering should not receive rushed, incomplete, or expectation-heavy requests after a client has already been told yes. The workflow protects technical decision-making and gives AMs a cleaner way to respond to clients.

Engineering Rule

Account Management should not give a client a technical yes or no before Engineering review. The correct response is: We will validate this internally with Engineering and return with a clear answer and next steps.

Step	Owner	Required Action	Engineering Response Options
1. Client request captured	Account Manager	Capture exact technical question, business reason, urgency, and client impact.	N/A
2. Engineering Query created	AM + NotebookLM	Convert request into a clear query summary with context and supporting notes.	N/A
3. Feasibility review	Engineering	Review asynchronously at the earliest reasonable opportunity based on priority.	Feasible / Not feasible / Needs scope / Roadmap candidate
4. Internal response logged	Engineering	Update the ticket or query record with technical notes and recommended client wording.	Response documented
5. Client update delivered	Account Manager	Communicate aligned answer, next steps, and expectations to client.	Client informed without overpromise

Engineering Query Required Fields	Purpose
Client request and exact language	Avoids translation loss between AM and Engineering
Business impact and urgency	Helps Engineering understand priority without guessing
Current product behavior	Clarifies whether issue is feature, defect, configuration, or misunderstanding
Client expectation and timeline pressure	Protects against accidental commitments
Requested Engineering decision	Makes the ask clear: feasibility, estimate, scope, or roadmap fit

SECTION 7

90-Day Intelligence Implementation Roadmap

The rollout stabilizes current workflows first, then builds intelligence infrastructure, then converts the system into a measurable operating cadence.

Phase	Days	Primary Goal	Key Actions	Expected Output
Phase 1	1-30	Stabilize and map intelligence gaps	Audit accounts, map note sources, define templates, build folders, clarify AM ownership, launch weekly cross-functional sync	Visible account risks, cleaner notes, early workflow discipline
Phase 2	31-60	Launch Product and Engineering intelligence workflows	Product briefs, Engineering Query process, dual contacts, customer health scoring, renewal tracker, risk recovery workflow	Fewer blind handoffs, better meeting prep, stronger feasibility control
Phase 3	61-90	Optimize and scale management visibility	KPI dashboard, executive summary, SOP refinement, department feedback loop, strategic account QBR structure	Repeatable operating system with leadership visibility

First 30-Day Management Focus

- Meet with each AM and cross-functional peer to document real workflow pain points.
- Create the first version of account, product, and engineering intelligence templates.
- Identify accounts with open technical requests, product concerns, or renewal risk.
- Establish weekly cross-functional visibility with Product, Support, Engineering, and management peers.

SECTION 8

Reporting, KPIs, and Management Cadence

The new system must be visible. If leadership cannot see risk, adoption, technical blockers, 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
Product brief completion	How often Product receives full context before client engagement	Reduced product meeting blind spots
Engineering query aging	How long feasibility questions remain open	Faster technical alignment and clearer prioritization
Handoff acceptance quality	How often downstream teams receive complete context	Reduced internal friction
Client engagement rate	How consistently AMs contact and meet with clients	Proactive communication
Renewal readiness	How many renewals have 90/60/30 checkpoints completed	No surprise non-renewals

Meeting	Frequency	Attendees	Purpose
CS team standup	Weekly	CS Manager + AMs	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
Intelligence review	Biweekly	CS Manager + Product + Engineering	Review quality of product briefs, query notes, and handoff acceptance
Leadership report review	Monthly	Director + CS Manager	Review KPIs, churn risks, workflow adoption, and improvement plan

SECTION 9

Templates and Team Checklists

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

Template	Required Fields
Account Intelligence Snapshot	Client name, AM owner, primary contact, secondary contact, renewal date, health status, product concerns, engineering questions, open issues, next step
Product Briefing Packet	Client goal, product area, requested outcome, timeline expectations, stakeholder concerns, prior notes, open questions, meeting objective
Engineering Query Ticket	Exact client ask, business impact, urgency, current product behavior, expected outcome, feasibility question, requested response type
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, blocker list
Risk Recovery Plan	Risk reason, account impact, recovery owner, client meeting date, internal action, target resolution date

Executive Closing Statement

This framework is designed to transform Client Success from a reactive communication layer into a strategic operational bridge. The Client Operations Intelligence Architecture gives each department clearer context, better preparation, stronger accountability, and a measurable path to improved client retention.

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