A JAYSON FORDE EXECUTIVE STRATEGIC PLAYBOOK

Track
Report
Act
LIFECYCLE INTEL

Client Lifecycle Journey Reporting

How I Automate Visibility Across the Client Journey, From New Client to Renewal

Lifecycle Tracking · Automated Reporting · Health Signals · Executive & Client Views

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BEFORE YOU BEGIN

Purpose & Impact

THE PURPOSE

This playbook exists because leadership and clients constantly need to know where each account stands, and the honest answer is usually hours of manual report assembly that is stale by the time it is done. Worse, risk hides: an account quietly stalls and no one sees it until the renewal is lost. This is my operator system for making the entire client journey visible automatically, so risk surfaces early and no one builds a report by hand.

WHAT IT SOLVES

- Hours lost assembling lifecycle and client-health reports by hand.
- Reports that are already stale by the time they reach leadership or the client.
- At-risk and stalled accounts going unnoticed until the renewal is already gone.
- Inconsistent metrics where the same number means different things to different people.

WHAT IT ENHANCES

- Visibility, one always-current view of every account's stage and health.
- Foresight, risk signals surface early enough to act, not just report.
- Trust, executives and clients see consistent, defined, reliable numbers.
- Operator leverage, reporting that assembles and delivers itself on a cadence.

THE RESULTS IT DELIVERS

- Lifecycle reports that compile and deliver themselves on schedule.
- Per-stage health signals that trigger interventions before value is lost.
- Executive and client-facing views generated automatically for the right audience.
- Earlier risk detection that protects retention and surfaces expansion.

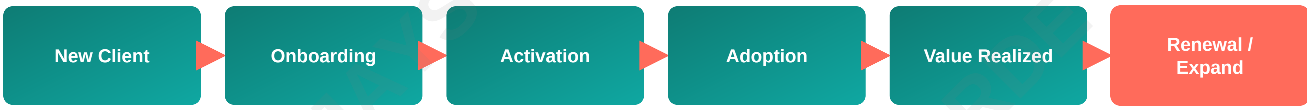
WHAT IMPROVEMENT AT SCALE LOOKS LIKE

At small scale this replaces manual reporting with automatic, reliable intelligence. At scale, the same pipeline reports on a portfolio of hundreds or thousands of accounts with no added manual effort, every account's health stays visible, risk is caught early across the whole book, and leadership steers retention and expansion from one live, trustworthy view.

EXECUTIVE OVERVIEW

Automated Visibility Across the Client Journey

This playbook is my operator system for automating reporting across the entire client lifecycle, so leadership and clients always see where each account stands, from new client through onboarding, adoption, value, and renewal, without anyone manually assembling a report.



THE CLIENT LIFECYCLE JOURNEY

EVIDENCE BOUNDARY

This playbook is a formalized reconstruction of the repeatable reporting methods I use. Tool configurations, metrics, and demonstration data are **illustrative and sanitized**; no confidential client data is represented. The methods are anchored to real experience building lifecycle and customer-health reporting.

What This Reporting System Delivers

- **One journey view**, every client's stage and health, visible in one place.
- **Automated reports**, compiled and delivered on a cadence, no manual assembly.
- **Health signals per stage**, on-track, at-risk, or stalled, triggering action.
- **Executive and client-facing views**, the right report for the right audience, automatically.

THE OPERATOR STACK

The Tools I Report With

Asana
ACTIVITY SOURCE

Asana is the source of truth for client work and stage status, tasks, milestones, owners, and progress that feed the lifecycle report.

Zapier
COLLECT & SYNC

Zapier collects and syncs activity across the stack into one place and normalizes it, so reporting draws from a single, current dataset.

NotebookLM
SUMMARIZE & REPORT

NotebookLM turns the data into a written lifecycle report, summarizing stage health, trends, and next actions in a format an executive or client can read.

Microsoft Power Automate
MS ECOSYSTEM ONLY

Power Automate runs the scheduled reporting and dashboard flows inside a Microsoft environment (Excel, SharePoint, Teams). **Applies only when the client operates on the Microsoft ecosystem.**

ONE STACK, ANY ENVIRONMENT

Asana, Zapier, and NotebookLM are the core stack. **Power Automate is used only for Microsoft-ecosystem clients**, the reporting logic is identical; only the engine changes.

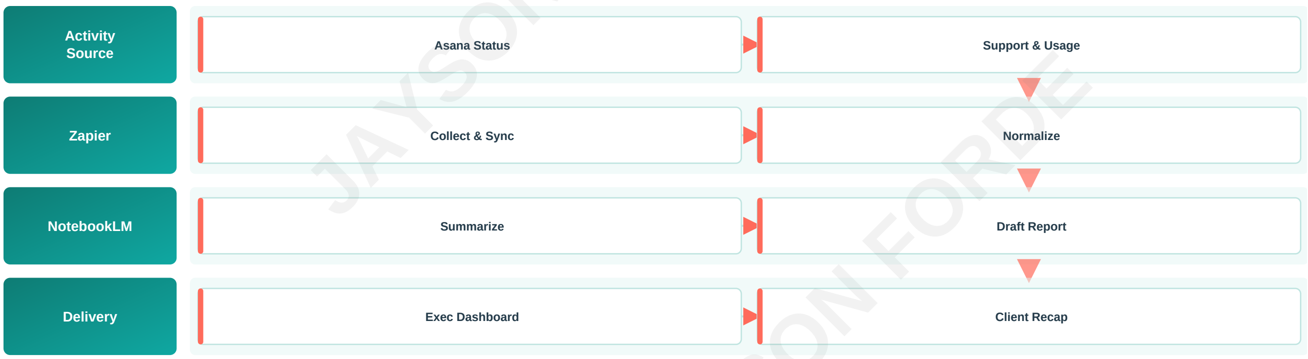
CONTENTS

The Lifecycle Reporting System

SECTION 01

The Reporting Pipeline

A client report should assemble itself. Activity flows from the source, gets synced and normalized, is summarized into a report, and delivered, with no one building a deck by hand.



REPORTING PIPELINE · ACTIVITY SOURCE TO DELIVERED REPORT

ACCOUNTABILITY

- The operator owns the report definition and the review before client delivery.
- Client-facing reports pass a human-review gate before sending.
- Data sources have named owners so the report stays accurate.

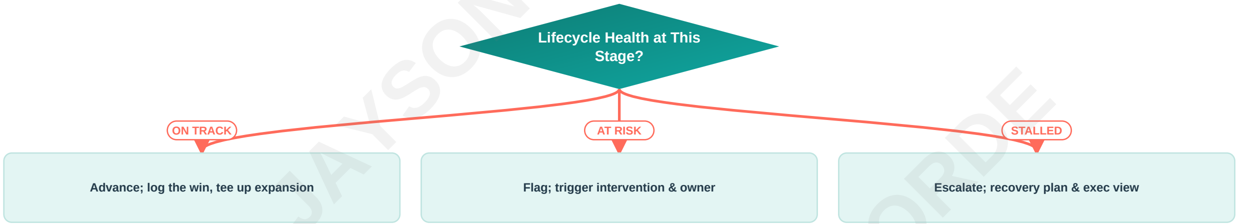
MEASUREMENT

- Report cycle time (manual assembly hours removed).
- Reporting cadence adherence (delivered on schedule).
- Data freshness and completeness in each report.

SECTION 02

Stage Health Signals

Reporting is only useful if it drives action. Each lifecycle stage is scored for health, and the signal routes the next move.



LIFECYCLE HEALTH DECISION PATH · ON-TRACK, AT-RISK, STALLED

On-track accounts advance and the win is logged with expansion teed up; at-risk accounts are flagged with an intervention and owner; stalled accounts are escalated with a recovery plan and an executive view. The report does not just describe, it triggers the right response.

ACCOUNTABILITY

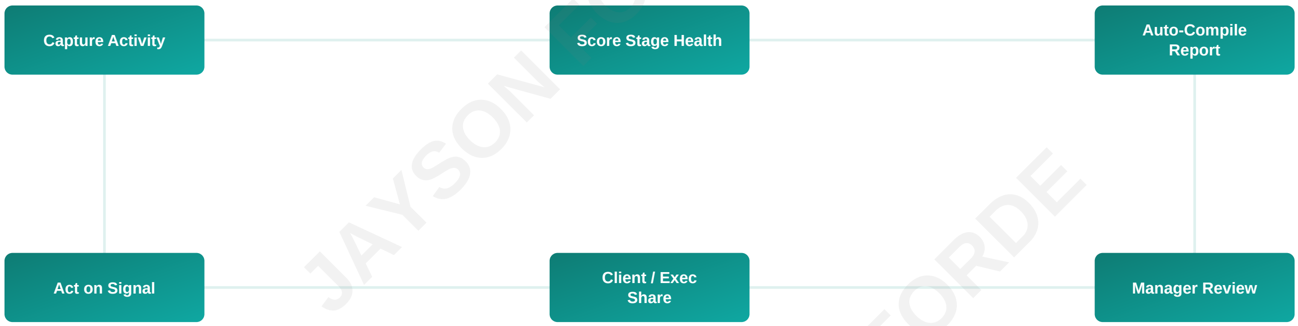
- Every at-risk or stalled account gets a named owner and a due date.
- Health scoring rules are owned and reviewed by the operator.
- Escalations reach leadership with the recovery plan attached.

MEASUREMENT

- Health-score distribution across the portfolio over time.
- Intervention response time and recovery rate.
- Net retention and expansion by cohort and stage.

03 · CADENCE

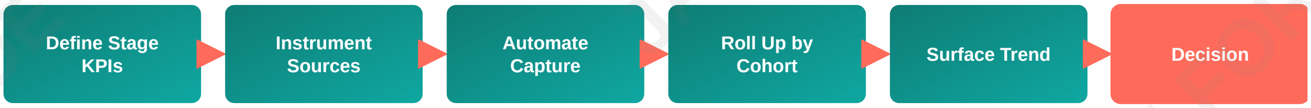
The Reporting Cadence



REPORTING CADENCE LOOP · CAPTURE TO ACT

04 · METRICS & GOVERNANCE

How the Metrics Are Built



METRIC BUILD PATH · DEFINE TO DECISION

ACCOUNTABILITY

- Each KPI has a definition, a source, and an owner, no ambiguous numbers.
- Automations are documented; nobody depends on a hidden spreadsheet.
- The operator governs what leadership and clients see.

MEASUREMENT

- KPI reliability and definition consistency.
- Automation uptime and reporting accuracy.
- Decision-to-action time off the report.

INSPECTABLE ARTIFACTS

The Reporting Toolkit

Portfolio-ready reconstructions of the reporting method with sanitized demonstration data, not original client records.

Lifecycle Stage Map

The journey stages with entry/exit criteria and KPIs.

Demo: sanitized map

Client Health Scorecard

Per-account health across usage, engagement, and risk.

Demo: sanitized rows

Automated Lifecycle Report

The auto-compiled stage-and-health report.

Demo: illustrative

Executive Portfolio Dashboard

The roll-up view of the whole book by stage and health.

Demo: sanitized

Reporting Cadence Calendar

Who receives what report, and when.

Demo: sample cadence

KPI Definition Register

Every metric with its definition, source, and owner.

Demo: illustrative

THE PLAYBOOK IN ONE LINE

I turn the client journey into **self-assembling, action-driving intelligence**, every account's stage and health visible automatically, and every risk surfaced before it costs a renewal.