

SAMPLE COR MEETING DECK

REPLACE WITH
CUSTOMER LOGO

[CUSTOMER NAME] + ClientSuccess
Customer Objectives Review Meeting
May 2021

COR MEETING AGENDA

1.

2.

3.

4.

5.

1.COMPANY AND BUSINESS UPDATE

WHAT WE'VE HEARD

COMPANY UPDATE

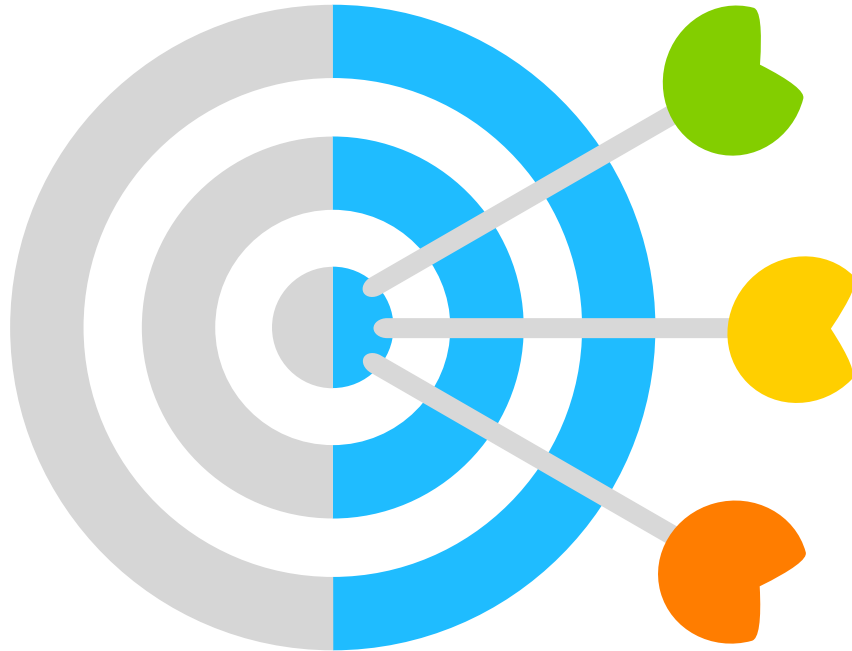
INSERT COMPANY LOGO IN PLACE
OF THIS YELLOW BOX

2.GOALS AND PERFORMANCE UPDATE

CUSTOMER JOURNEY STAGES

Insert your Customer Journey

YOUR TOP 3 PARTNERSHIP GOALS



GOAL 1

Please define your core KPIs for tracking the success of this goal.

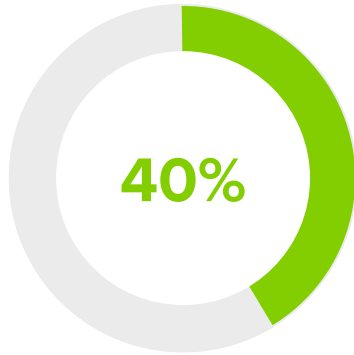
GOAL 2

Please define your core KPIs for tracking the success of this goal.

GOAL 3

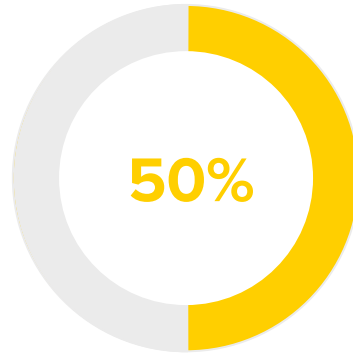
Please define your core KPIs for tracking the success of this goal.

PROGRESS TO DATE



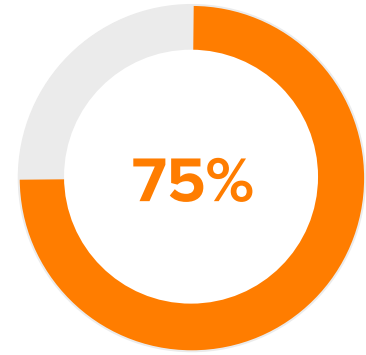
GOAL 1

Please provide some context as to the progress we've made and what we need to do next - keep it high level.



GOAL 2

Please provide some context as to the progress we've made and what we need to do next - keep it high level.

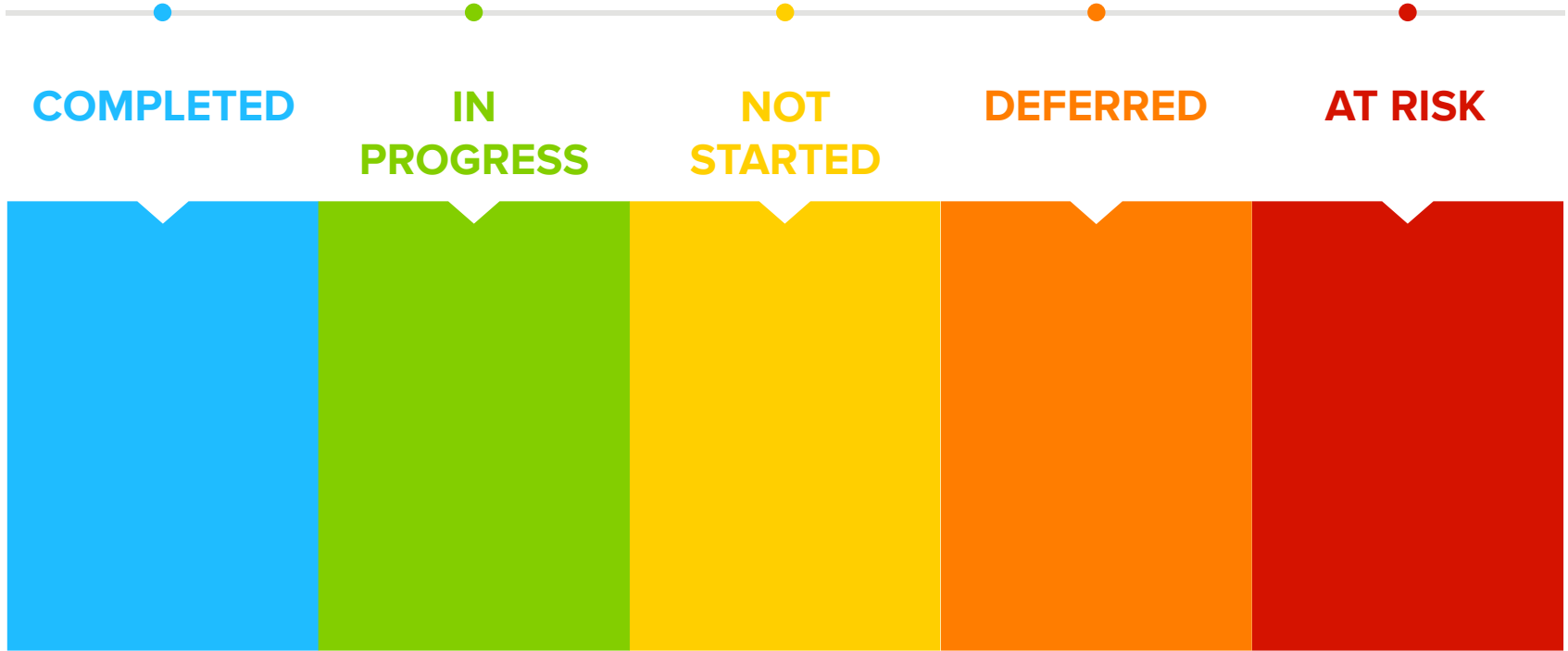


GOAL 3

Please provide some context as to the progress we've made and what we need to do next - keep it high level.

3. PARTNERSHIP ENGAGEMENT

PROGRESS TO DATE



CLIENTSUCCESSION USAGE AT [CUSTOMER NAME]

Include Product Usage and Adoption Data

4.IDEAS AND RECOMMENDATIONS

Recommendation #1

Provide recommendations to the customer that are relevant to their continued growth and adoption of the product.

Recommendation #2

Provide recommendations to the customer that are relevant to their continued growth and adoption of the product.

5.SENTIMENT AND NEXT STEPS

PARTNERSHIP SENTIMENT

WHAT IS YOUR OVERARCHING SENTIMENT ON THE PARTNERSHIP TO DATE?

IF YOUR RENEWAL WAS TODAY, WOULD YOU RENEW?

HOW CAN WE BE BETTER PARTNERS TO YOU?

WHAT FEEDBACK WOULD YOU LIKE TO SHARE WITH US TODAY?

PARTNERSHIP NEXT STEPS



Thank You