

CUSTOMER SUCCESS NURSE BRAIN

A nurse-inspired daily operating tool for Customer Success | v3 (Fillable)

Inspired by nursing. Built for Customer Success.

Date:

Name:

TOP 3 PRIORITIES

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CUSTOMER CENSUS / DAILY ROUNDS

Customer	CSSI	Health / Notes	Next Milestone	Due
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HIGH-RISK ACCOUNTS / ESCALATIONS (CSSI 1-2)

1. Account: Owner:

Issue / Risk:

Next Step:

2. Account: Owner:

Issue / Risk:

Next Step:

TODAY'S MEETINGS & TOUCHPOINTS

Time	Customer	Purpose	Notes
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WAITING FOR / DEPENDENCIES

Person / Team	Customer	Due	Follow-Up

RISK FOR "READMISSION" (ACCOUNT DETERIORATION)

Missed meeting	Adoption declining	Multiple support tickets
Executive disengaged	Renewal approaching	Competitor mentioned
Scope creep	Delayed implementation tasks	Unclear ownership

ACCOUNT NOTES / CUSTOMER STORY

END OF DAY HANDOFF

Wins:

Open Loops:

Tomorrow's First Actions:

CSSI QUICK REFERENCE

1 = Critical Business Impact | 2 = High-Risk Account | 3 = Active Project/Implementation | 4 = Routine Success | 5 = Administrative