



Turn signals into action

A product demo for customer success teams

ILLUSTRATIVE PRODUCT CONCEPT

Signals delay action

The customer story is split across tools, teams, and time.

01 ACTIVITY

Usage drops

Usage falls.

The account owner never sees it.

PRODUCT ANALYTICS

02 SENTIMENT

Champion lost

The CRM changes, but no retention motion begins.

CRM

03 COMMERCIAL

Renewal close

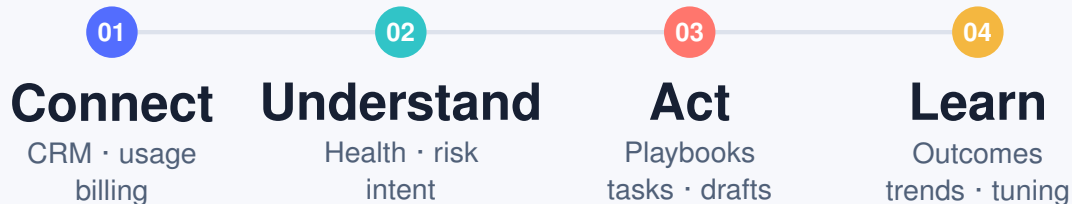
The pattern appears only when options are limited.

BILLING

 **The cost is not missing data. It is delayed action.**

One workspace. One move

Pulse connects context, judgment, and execution in one operating loop.



Every signal ends with an owner and a next step.

Rank accounts by urgency

Focus the team on accounts where timing and impact intersect.

 pulse

Today

Accounts

Playbooks

Insights

EAST TEAM

Today's priorities

12 NEED ATTENTION

ACCOUNT	WHY NOW	OWNER	ACTION
92 Northstar Labs	Usage -31% · new champion	Maya	Review
84 Brightpath	Renewal 46d · 2 open issues	Andre	Plan
77 Kinetic Works	Expansion intent · 8 invites	Leah	Reach out
63 Summit Health	QBR overdue · adoption stable	Maya	Schedule

Explain the score

Open any account and see the evidence behind the priority.

Northstar Labs

AT RISK

Renewal · 74 days

HEALTH

58

Down 18 points
in 30 days

WHAT CHANGED

- **Product usage**
Weekly active users fell 31%.
- **Relationship**
Primary champion changed roles.
- **Support**
Two priority issues remain open.

RECOMMENDED NEXT STEP

**Launch
playbook**

Champion change
Three owners

START PLAYBOOK

Coordinate the response

Move from insight to a coordinated response without losing context.

PLAYBOOK

Champion change

Rebuild the buying
group before renewal.

OWNER MAYA

DUE FRIDAY

[View account brief →](#)

Response plan

- 1 Confirm the account story**
Review evidence and open issues
Maya
- 2 Map the new buying group**
Identify sponsor and decision roles
Maya
- 3 Prepare executive outreach**
Draft a value recap for approval
AI + Maya
- 4 Close the loop**
Record outcome and tune health
Auto

AI drafts. People decide.

Automate preparation, not accountability.

Executive draft

AI ASSISTED

SUBJECT

Northstar's next value milestone

Hi Jordan,

We noticed a shift in weekly adoption after the recent team change. Can we reconnect on the next value milestone?

APPROVE

EDIT

BUILT-IN CONTROL

- **Grounded context**
Uses the account record and approved sources.
- **Human approval**
No external message is sent automatically.
- **Audit trail**
Inputs and edits remain reviewable.

One operating picture

See portfolio risk, action, and movement in one view.

Portfolio pulse

THIS QUARTER

18

Accounts to review

27

Active playbooks

81%

On-time actions

RISK BY SEGMENT

Enterprise  22%

Midmarket  14%

Scale  8%

ACTION COMPLETION



Connect with control

Add a shared operating layer without replacing systems of record.

CONNECTED CONTEXT



CRM records



Product activity



Support history



Billing events



Team messages



Warehouse data

GOVERNANCE BY DESIGN

- **Identity controls**

SSO · role-based access · provisioning

- **Data boundaries**

Workspace-scoped access and retention settings

- **Reviewability**

Activity history for signals and actions

Reach value in three steps

Begin with one team, prove the operating rhythm, then expand.

WEEK 1

1

Connect

Map sources
and import a
pilot portfolio.

WEEK 2

2

Calibrate

Agree on health
signals and
ownership.

WEEKS 3-4

3

Operate

Launch actions;
review outcomes.

Success measure: one team, one customer truth.



Never guess the next best action

Bring one customer journey. We'll map it in Pulse.

[START A WORKING SESSION](#)