Customer Meeting Facilitation & Summary Email Standards (Internal Use)

11/21/2025 11:58 am EST

Purpose

Define how CSMs prepare for, facilitate, and follow up on customer meetings so every call is efficient, documented, and action-oriented. This ensures consistent customer experience and reliable internal handoffs.

Scope

Applies to all customer-facing recurring and ad-hoc meetings (status calls, discovery, issue reviews, planning workshops). Does not cover formal project ceremonies run by PMO (e.g., standups) unless the CSM is acting as facilitator.

CSM Role on Calls

- **Facilitator & timekeeper:** start on time, keep agenda flowing, park off-topic items, and finish with clear next steps.
- **Recorder:** capture outcomes, decisions, owners, and dates in an actionable format.
- **Connector:** ensure the right internal SMEs speak to their items; highlight cross-team dependencies.
- **Custodian of follow-through:** confirm owners and due dates; drive the post-call summary and Salesforce updates.

Workflow

1) Day-Before Prep (15–30 min)

- **Review context:** last summary email, case notes, open actions, and internal threads.
- **Nudge owners:** 1–2 line reminder to internal speakers about their update (include what, who, when).
- **Draft & share agenda:** email and/or attach to the Teams invite so all participants can see it.
- **Meeting objective:** write a one-sentence objective at the top of the agenda ("Today we will…") to align expectations.

Agenda template (drop into invite/email)

1. Quick wins / updates (5m)
2. Open issues & decisions needed (15–20m)
3. Upcoming milestones / dates (5–10m)
4. Action items & owners (5m)
5. Next meeting (2m)

2) During the Meeting

- **Start strongly:** introductions (name + role), confirm recording is on, restate objective and agenda.
- **Share or point to agenda:** you screen-share the agenda or direct to the Teams invite if someone else must share.
- **Facilitate:** keep cadence, time-box topics, and use a "parking lot" for off-agenda items.
- **Capture notes in structured outline:**
  - **Discussion Points** – summary bullets by topic (who said what, key context/decisions).
  - **Action Items / Deliverables –** Owner | What | Due Date.
  - **Important Dates** – milestones, checkpoints, launch windows.
  - **Issues / Risks** – impact, status, what's needed to unblock.
  - **Escalations** – who/what/when, internal path.
  - **Next Steps –** immediate moves before next call.
  - **Questions –** open questions, who will answer and by when.
- **Confirm logistics at close:** read back decisions and action items, confirm owners/dates, agree on the **next meeting date/time**.
- **Thank participants.**

Tip: If you miss specifics, mark "(verify in transcript)" beside the line to reconcile before sending the summary.

3) After the Meeting (Same-Day)

- **Write the summary using the same headings** you used live. Keep it skimmable and owner-focused.
- **Send same day** on the existing email thread to maintain continuity (subject example below).
- **Log to Salesforce:** paste the summary (or link the email), update account/project notes, cases, and next-step tasks.

Recommended email subject
[Customer Name] – Call Summary & Actions – YYYY-MM-DD

Recommended email body (copy/paste skeleton)

- **Attendees:** Name (Role), …
- **Objective:** *one sentence*
- **Discussion Points:**
  - Topic A — brief summary (Speaker)
  - Topic B — brief summary (Speaker)
- **Decisions:**
  - D1 — what, by whom, effective when
- **Action Items / Deliverables:**
  - Owner – Action – Due (YYYY-MM-DD)
- **Important Dates:** milestone / date / owner
- **Issues / Risks:** issue – impact – current status – ask
- **Escalations:** path/owner/ETA
- **Next Steps:** who/what/when
- **Next Meeting:** date/time + calendar link

Quality Bar (What "Good" Looks Like)

- **Specific owners & dates** on every action (no "we" or "ASAP").
- **Decisions called out** and timestamped.

- **Customer-safe language** (assume it may be forwarded). Internal sensitivities go to **Internal Comments** on the case.
- **Same-day summary** unless otherwise agreed during the call.
- **Consistency:** same headings every time so teams know where to look.

Recording & Privacy Notes

- Obtain verbal consent to record at the start and respect any objections.
- Store recordings/notes where your team expects them (Teams channel folder, linked in Salesforce).
- Do not include confidential internal strategy in customer-visible text; use internal fields/comments.

Common Pitfalls & How to Avoid

- **Vague actions:** Replace “follow up” with “Jordan to email API payload examples by 2025-09-08.”
- **No timeboxing:** Use the agenda time estimates and give 2-minute warnings.
- **Unclear next meeting:** Lock date/time before leaving the call.