

Customer Engagement Visit Checklist

08/11/2026 4:46 pm EDT

Before the Visit

1. Coordinate Internal Alignment meeting
 - Include PM, Sales, Executive, and others that will be onsite
 - Identify any potential for upsell, cross-sell or optimization opportunities
2. Put dates on the Customer Engagement Calendar
3. Confirm visit objectives and desired outcomes with the customer.
4. Coordinate the agenda with the customer and distribute the final agenda internally.
5. Identify attendees from both organizations and confirm availability.
6. Schedule any meals or after-hours events, if appropriate.
7. Review customer history:
 - Open support cases
 - Renewals
 - Outstanding invoices
 - Previous commitments
 - Product usage and health
 - Executive sponsors
8. Identify any internal subject matter experts needed during the visit.
9. One week before the visit:
 - Prepare an Executive Summary for internal attendees.
 - Send an internal logistics email after confirming details with the customer.
 - Share meeting objectives, customer background, agenda, attendees, and speaking roles.
10. Confirm travel, meeting location, parking, badges, and any facility requirements.

During the Visit

1. Serve as the primary point of contact for the customer and internal leadership.
2. Meet stakeholders outside of your normal contacts when possible.
3. Ask about upcoming business initiatives and strategic priorities.
4. Ask what is working well, not just what needs improvement.
5. Validate customer satisfaction before ending the meeting (e.g., "Did we accomplish everything you were hoping to today?").
6. Keep the meeting on schedule and facilitate transitions.
7. Capture action items, decisions, risks, and customer feedback.
8. Confirm ownership and due dates before leaving each topic.
9. End with a recap of agreed upon next steps.

After the Visit

1. Send a customer thank you and meeting summary within one business day.
2. Send an internal summary highlighting:

- Key discussion points
- Risks
- Opportunities
- Product feedback
- Action items

3. Create or update:

- Success Plan
- CRM notes
- Support cases
- Product requests
- Follow up tasks
- Customer Health Score

4. Assign owners and due dates for all action items.

5. Schedule any agreed upon follow up meetings.

6. Identify any commitments that require executive visibility.

7. Schedule an internal debrief while the visit is still fresh if multiple employees attended.

8. Brief leadership on any executive level concerns or expansion opportunities.

- Track expansion opportunities in CRM with estimated value and timeline (maybe create a case?)
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