The Strategic CS Conversation Copilot

Use this prompt to prepare for your meetings:

PURPOSE: Create a pre-meeting briefing that helps me run a high-leverage conversation with a customer, and give me the strategic questions to ask.

If I haven't told you the meeting type, objective, or attendees, ask before doing anything else. Don't guess.

INTAKE: (ask if missing)

- Customer name
- Meeting type: Renewal / QBR / Expansion / Escalation / Save / Discovery / Exec intro / Regular cadence
- My objective for this meeting
- Attendees: name, title, anything I already know about them
- Contract context if relevant: ARR, renewal date, tier
- Adoption metrics: Pull these from internal sources during research first - only ask me if you can't find them.
- Internal playbooks or case studies, if you have any to attach

RESEARCH ORDER: Check internal sources first, always, before any public search:

1. Your CRM
2. Your call notes (transcripts)
3. Internal messaging like Slack
4. Internal playbooks and case studies (attached, if provided). Use these to shape tone, objection handling, and which customer stories might apply. If none are attached, skip this step and say so.

Only after that, use public sources for company-level context: news, funding, leadership changes, job postings signaling new priorities. Last 90 days only, unless older context explains why the last 90 days matter. Cite everything. If something's uncertain, say so and say why.

If there's nothing public because the company is small or private, just say that. Don't pad it.

QUESTIONS: Pull 8-10 questions from the bank below. For a Regular cadence meeting, pull only 3-4 - these are lighter touch, not a full discovery session. Don't invent new ones unless the bank genuinely has nothing that fits. Match your picks to the meeting type using the suggested pulls, then adjust based on what you learned in research. Organize the final list into the three buckets.

Bucket A - About Their Business A1. What's the top priority for your company over the next 12-24 months? A2. What would your boss say is the top topic to focus on? A3. Who is your customer, and what's the biggest challenge they need you to solve?

Bucket B - About the Individual B1. What's your number one priority you need to complete in the next 90 days? B2. What has just been added to your plate that we haven't discussed? B3. What's the one skill or area of growth your team is focused on? B4. Beyond our product, what's the biggest problem you would like to solve if you could? B5. What's the hardest part of your job right now? B6. If I asked your boss, what is the one thing they want you to focus on right now? B7. What request or call do you most dread getting? (use carefully)

Bucket C - About the Product/Relationship C1. On a scale of 1-5, how painful would it be to switch providers? C2. If your renewal was tomorrow and your boss asked for your input, how likely are you to renew from 1-5 with 5 being most likely? C3. What do you love most about us? C4. If you had coffee with our CEO, what would you say? C5. What's been your biggest win or disappointment since you started working with us? C6. What's the one improvement in our products you'd love to see C7. What's one example where we didn't meet your expectations? C8. What is the biggest technology gap you are seeing and which companies are you speaking to assist here besides us?

Suggested pulls by meeting type:

- Renewal: C1, C2, C6, B6, A1
- QBR: A2, B2, B6, C3, C4, C8
- Escalation: B5, B7, C4, C7
- Save: B4, B5, C1, C6, C8
- Expansion: B3, B6, C6, A3
- Regular cadence: B1, B2, A1

Avoid generic or polite questions. No filler like "how's everything going."

OUTPUT FORMAT: Keep it scannable. Cut any section that has nothing new to say - don't fill space with boilerplate.

1. Core Business Profile - what they sell (products, pricing model if public), who they sell to, and a brief overview of who the company is. This isn't just a preamble. Use it to shape every section below - the stakeholder read, the risks, and the questions should all reflect what kind of business this actually is, not generic advice that could apply to anyone.
2. Current Strategic Focus & Challenges (What has changed in the Last 90 Days) - 3-4 bullets, cited, uncertain items flagged.
3. The one thing to lead with - the single most strategic angle for this meeting, one sentence. Should follow from sections 1 and 2, not sit apart from them.
4. Stakeholder read - per attendee, 2-3 bullets on what they care about and how to read them in the room. Ground this in the business profile from section 1 - what would someone in this role at this kind of company actually be judged on.
5. What could go wrong - real risks specific to this conversation, not generic ones. Should connect back to the business model in section 1, not just the relationship history.
6. Questions to ask - the 8-10 from above, organized by bucket. Pick and phrase these with the business profile in mind.
7. My opening move - give me two different ways to open, not one. Both should start with their business, not our product or the ask itself. Each opening line should be a question or observation that could only make sense once you understood the business profile in section 1 - about their operations, their season, their customer, their model. Don't open with the integration, the feature, or anything relationship-history-related. Earn the right to get there. If a draft opening mentions our product, our tools, or the specific ask in the first line, rewrite it. Make the two options genuinely different angles on the business (e.g. operational pressure vs. their customer's experience), not two phrasings of the same idea.