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CUSTOMER SUCCESS · GUIDE

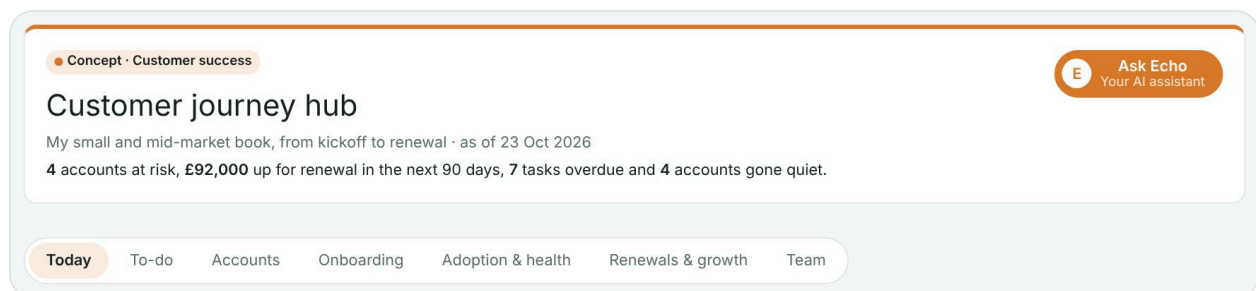
How to use the Customer Journey Hub

One place to run a small and mid-market book of hospitality customers, from the sales handover through implementation, go-live, adoption and renewal. This guide walks through every screen with real screenshots.

[Open the dashboard ↗](#)[Prototype with made-up data · as of 23 Oct 2026](#)

STEP 1

Getting started



The header and tabs, the same on every screen.

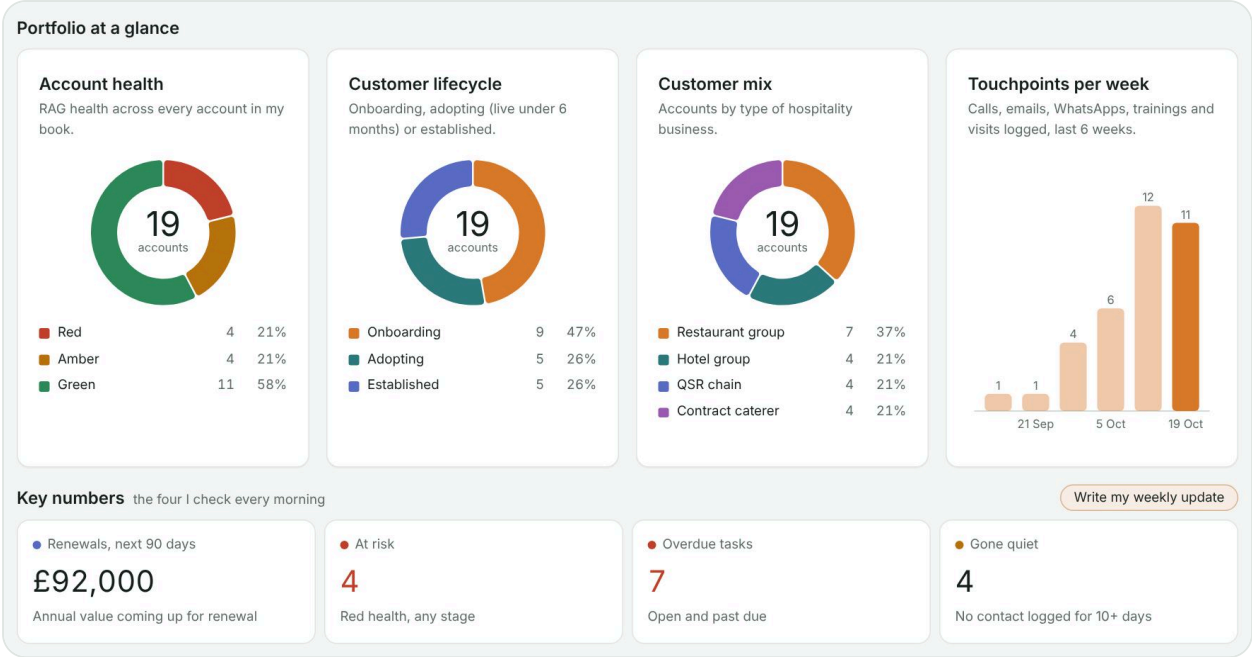
- 1 **Read the headline.** It sums up the day: accounts at risk, renewals coming up, overdue tasks and customers gone quiet.
- 2 **Move between tabs:** Today, To-do, Accounts, Onboarding, Adoption & health, Renewals & growth and Team. On a phone, swipe the tab bar sideways.
- 3 **Click any customer name,** in a chart, list or calendar, to open their account page.
- 4 **Ask Echo,** the orange button, opens the AI assistant from anywhere.

TIP **Your changes stay on your device.** Logged calls, new tasks, ticks and health updates are saved in your browser only. Use **Reset demo data** at the bottom of the dashboard to start fresh (click twice to confirm).

Today

The morning check: where the book stands and what needs you first.

Portfolio at a glance



TIP

Write my weekly update (top right of this row) drafts a weekly summary of the book in one click.

My to-do and accounts needing attention

- 1** My to-do shows overdue first, then today and this week. Tick a task to complete it.
- 2** See all tasks opens the full To-do tab.
- 3** Accounts needing attention lists renewal risks, escalated tickets, struggling customers, overdue QBRs and anyone gone quiet, each with the reason.
- 4** Click a customer to go straight to their account and its playbook.

My to-do list
What is overdue, due today and due this week, across onboarding, QBRs, renewals and growth.

Mine Mine and client's

OVERDUE 5

- ☐ Chase HR for staff export file 3d late
Saltmarsh Hotels
- ☐ Rebook QBR with Sarah (new HR director) 2d late
Meridian Hotels
- ☐ Escalate content delay to account sponsor 1d late
Fernway Catering
- ☐ Recovery call and new go-live plan 1d late
Fennel & Fig
- ☐ Nudge sites with under 50% training complete 1d late
Ramble Coffee Co

TODAY 3

- ☐ Agree revised go-live date with Head of People Today
Saltmarsh Hotels
- ☐ Check course assignments at 6 lagging sites Today
Harbour & Hearth Pub Co

Accounts needing attention

Renewals at risk first, then escalations, at-risk accounts, overdue QBRs and accounts gone quiet. Tap one to open it.

Status	Why	Account
Renewal risk	Renews in 38 days (£22,000), health 41. Champion left in August, weekly active down from 74% to 47%	Bun & Bean
Renewal risk	Renews in 53 days (£29,000), health 58. Usage down 12 points since a new HR director started, QBR not rebooked	Meridian Hotels
Escalation	Push notifications not reaching staff at 6 sites (P1, open 18 days)	Bun & Bean
Escalation	Course completions not syncing (P2, open 5 days)	Ramble Coffee Co
At risk	Go-live slipped. internal	Fennel & Fig

Accounts needing attention, with the reason for each.

STEP 3

To-do

Every task in one list, soonest first, with completed ones at the bottom.

- 1 Filter to see all tasks, only mine, or only the ones waiting on the customer.
- 2 Tick a task to mark it done. It also shows on the Team activity feed.
- 3 Tasks from teammates appear here too, marked "(from Sofie)", for example.

My to-do list

Every task, soonest first, with completed ones at the bottom. Tick a task to mark it done.

Mine

Mine and client's

OVERDUE 5

☐

Chase HR for staff export file

Saltmarsh Hotels

3d late

☐

Rebook QBR with Sarah (new HR director)

Meridian Hotels

2d late

☐

Escalate content delay to account sponsor

Fernway Catering

1d late

☐

Recovery call and new go-live plan

Fennel & Fig

1d late

☐

Nudge sites with under 50% training complete

Ramble Coffee Co

1d late

TODAY 3

☐

Agree revised go-live date with Head of People

Saltmarsh Hotels

Today

My workload



Booked kickoffs, trainings, QBRs, renewal calls and visits per week. A red bar means that week is over 30 hours, so move something before it happens.

STEP 4

Accounts and the account page

Every customer in one list, and everything about one customer on one page.

All accounts

Every account from kickoff to renewal: stage, health, adoption, renewal, value and last contact. Tap a row for the full picture.

Search accounts

Account	Stage	Health	Health score	Staff active	Renewal	Value	Last contact
Bun & Bean QSR chain · 30 sites · 360 staff	■ Live	Red	41	47%	30 Nov in 38 days	£22,000	2 days
Oakwood Tavern Group Restaurant group · 22 sites · 450 staff	■ Live	Green	82	84%	1 Dec in 39 days	£27,000	3 days
Meridian Hotels Hotel group · 9 sites · 480 staff	■ Live	Amber	58	61%	15 Dec in 53 days	£29,000	14 days
Lantern Lane Pubs Restaurant group · 12 sites · 240 staff	■ Live	Green	91	93%	13 Jan in 82 days	£14,000	9 days
Harvest Table Catering Contract caterer · 40 sites · 470 staff	■ Live	Green	76	78%	1 Mar in 129 days	£28,000	7 days
Kestrel Workplace Dining Contract caterer · 11 sites · 210 staff	■ Live	Green	83	92%	30 Jun in 250 days	£13,000	22 days
Copperleaf Dining Restaurant group · 14 sites · 340 staff	■ Live	Green	85	94%	14 Jul in 264 days	£20,000	4 days

- 1 Search by name, type or stage.
- 2 Sort by clicking a column heading, for example health or renewal date.
- 3 Click a customer to open their account page.

The top of the account page

Bun & Bean

QSR chain · 30 sites · 360 staff · Established since Nov 2025

Health score

41 / 100

Contract value

£22,000 a year

Renews

30 Nov 2026 (38 days)

Last QBR

21 Jul 2026

Next QBR

21 Oct 2026 (overdue)

NPS

4 / 10

Expansion

None identified yet

Call prep notes

Create QBR deck

QBR document

Renewal prep

Ask Echo

Champion left in August, weekly active down from 74% to 47%

Health

Update health

- 1 **Facts at a glance:** health score, contract value, renewal date, last and next QBR, NPS and growth opportunity. Anything overdue is in red.
- 2 **Buttons:** call prep notes, QBR deck, QBR document, renewal prep and Ask Echo (see Echo below).
- 3 **The blocker** in red is the one thing in the way right now.

Playbooks

Playbooks switch on by themselves when a customer needs one, and tell you what to do next.

- **Rescue:** health score under 50.
- **Renewal:** renews within 90 days.
- **Go-live recovery:** go-live date passed and not live.
- **Re-engage:** no contact for 10 days or more.
- **Advocate:** NPS of 9 or 10, ask for a reference or case study.

TIP

Add these steps to my tasks

turns the playbook into dated tasks in one click.

Rescue playbook Why: Health score 41, under 50

1. Call the exec sponsor this week
2. Find or replace the internal champion
3. Agree a 30-day recovery plan with dates
4. Retrain the lagging sites
5. Review progress weekly until health is above 60

Add these steps to my tasks

Renewal playbook Why: Renews in 38 days

1. Confirm who signs and when
2. Hold a value review (QBR) 60 days before renewal
3. Send the renewal proposal 45 days before
4. Put growth on the table if health is green

Add these steps to my tasks

Onboarding checklist

16 steps from the sales handover to the first QBR. Tick them as you go.

Onboarding checklist 16 of 16 steps done

- | | | | |
|--|---|---|--|
| ☒ Kickoff | ☒ Kickoff-questionnaire-completed | ☒ Kickoff-call-held | ☒ Success-goals-agreed |
| ☒ Handover from sales | ☒ Handbooks uploaded | ☒ Courses assigned | |
| ☒ Sites and roles set-up | ☒ Staff invited | ☒ Invite posters in staff rooms | |
| ☒ Admins trained | ☒ Staff training sessions done | | |
| ☒ Manager training done | ☒ Go-live day support | | |
| ☒ GO-LIVE | ☒ First QBR held | | |
| ☒ Launch comms sent | | | |
| ☒ LIVE | | | |
| ☒ 30-day review | | | |

Sites

Staff, activation and training for every site, so one struggling site can't hide behind a good average.

Sites (30, 11 lagging)

Site	Staff active	Training done	Status
Thurso	17%	11%	Lagging
Preston	17%	22%	Lagging
Hexham	17%	18%	Lagging
Aldeburgh	18%	24%	Lagging
Bedford	19%	23%	Lagging
Rye	21%	12%	Lagging

Support tickets

Issue	Priority	Status	Opened
Push notifications not reaching staff at 6 sites Tracked in Linear - LTN-482	P1 - escalated	Open	5 Oct

Support tickets

Open issues with priority, escalation and the Linear reference, so you know before you call.

Issue	Priority	Status	Opened
Push notifications not reaching staff at 6 sites Tracked in Linear - LTN-482	P1 - escalated	Open	5 Oct

Log a call or note

Pick the channel, write a line, save. It takes seconds and appears in the activity log and the team feed.

Date	Channel	Note	
21 Oct	Call	Chris worried about renewal. Agreed to a relaunch plan and a new champion, PriL.	
14 Oct	Email	Sent site-by-site usage report, 11 sites under 30% active.	

TIP

Contacts and tasks sit lower on the page. "Add task" can assign a task to me, the client or a teammate.

STEP 5

Onboarding and implementation

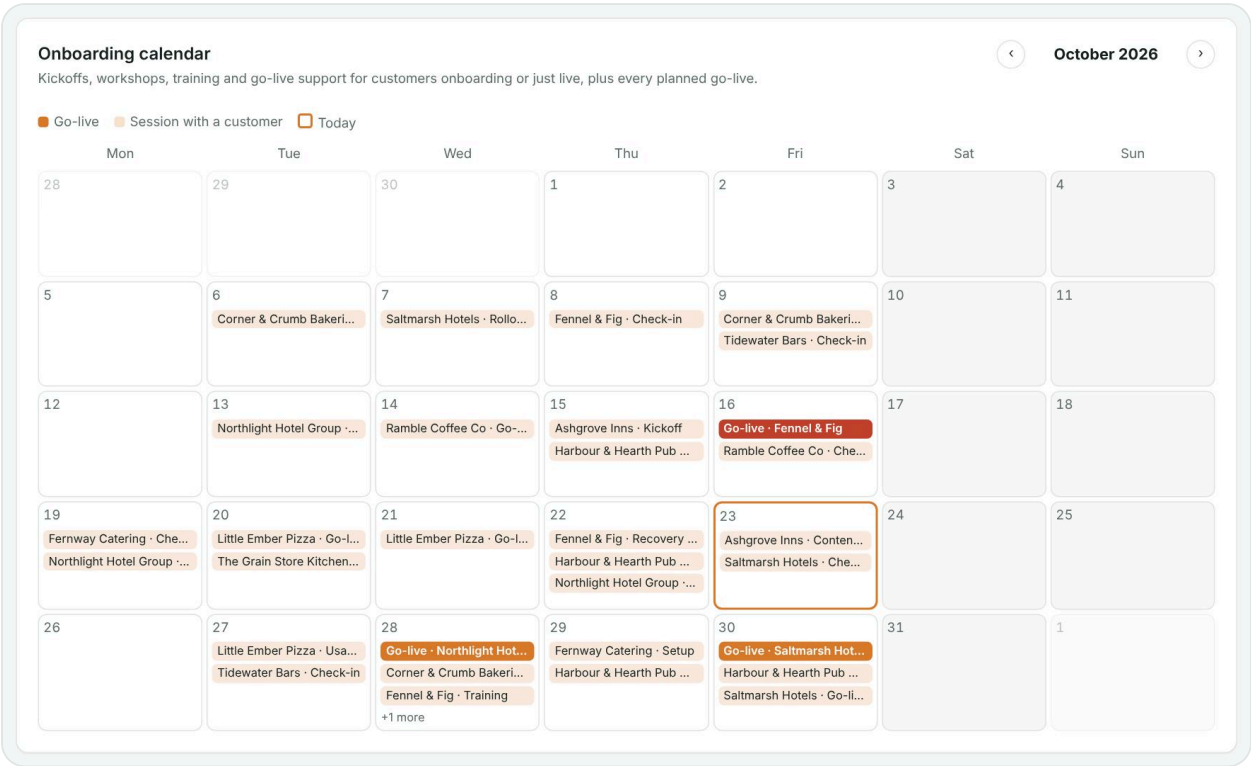
Every customer not live yet, from kickoff to go-live and their first 90 days. The target is about 45 days from kickoff to launch.

Key numbers



Customers onboarding now, how many need help, go-lives in the next 30 days and average time to go-live.

Onboarding calendar



- 1 Sessions (kickoffs, workshops, training, go-live support) show in light orange.
- 2 Go-lives are solid orange, and red if the date has passed.
- 3 Use the arrows to change month. Click an entry to open the customer.

Onboarding tracker

Onboarding tracker

Every customer I'm onboarding, the ones who need help first. Click a customer to open their account.

Customer	Stage	Checklist	Staff activated	Training done	Go-live	Next session	Next step
Fennel & Fig Red Restaurant group · 8 sites · 140 staff	Training	11/16	64%	31%	16 Oct 7 days late	Training 28 Oct · 3h	Staff training sessions done Go-live slipped, internal champion left the business
Saltmarsh Hotels Red Hotel group · 7 sites · 380 staff	Staff rollout	9/16	38%	12%	30 Oct in 7 days	Check-in 23 Oct · 1h	Invite posters in staff rooms HR export delayed, 150 staff not yet invited
Fernway Catering Red Contract caterer · 31 sites · 420 staff	Content & setup	6/16	0%	0%	10 Nov in 18 days	Setup 29 Oct · 3h	Courses assigned Handbook content not supplied, ops director on leave
Harbour & Hearth Pub Co Amber Restaurant group · 18 sites · 420 staff	Training	11/16	72%	48%	3 Nov in 11 days	Training 29 Oct · 4h	Staff training sessions done GMs slow to assign courses at 6 sites
Tidewater Bars Amber Restaurant group · 9 sites · 190 staff	Staff rollout	9/16	55%	20%	6 Nov in 14 days	Check-in 27 Oct · 1h	Invite posters in staff rooms Low app downloads at 3 late-night sites
Northlight Hotel Group Green Hotel group · 4 sites · 240 staff	Training	11/16	86%	71%	28 Oct in 5 days	Go-live support 28 Oct · 5h	Staff training sessions done

One row per customer, those who need help first: stage, checklist progress (for example 11/16), staff activated, training done, go-live date with days to go or days late, the next session, the next step and any blocker.

Checklist by stage

Checklist by stage

Steps done in each stage for every customer onboarding. The outlined box is the stage they're in now.

Customer	Kickoff	Content & setup	Staff rollout	Training	Go-live	First 90 days
Fennel & Fig	4/4	3/3	3/3	3/2	0/2	0/2
Saltmarsh Hotels	4/4	3/3	3/2	0/2	0/2	0/2
Fernway Catering	4/4	3/3	0/3	0/2	0/2	0/2
Harbour & Hearth Pub Co	4/4	3/3	3/3	1/2	0/2	0/2
Tidewater Bars	4/4	3/3	3/3	0/2	0/2	0/2
Northlight Hotel Group	4/4	3/3	3/3	3/2	0/2	0/2
Corner & Crumb Bakeries	4/4	3/3	0/3	0/2	0/2	0/2
Ashgrove Inns	2/4	0/3	0/3	0/2	0/2	0/2
The Grain Store Kitchens	2/4	0/3	0/3	0/2	0/2	0/2

Green is complete, amber is partly done, grey is not started. The outlined box is the stage they're in now.

My onboarding plan

My onboarding plan

How I'd take a small or mid-market customer from signed to live in about 45 days, then into regular checkpoints. Example plan, I'd follow the team's own process.

1 Kickoff Week 1 WHAT I DO - Handover from sales - Kickoff questionnaire completed - Kickoff call held - Success goals agreed WHAT THE CUSTOMER BRINGS Kickoff questionnaire back before the call, the owner or ops director and a champion named DONE WHEN Success goals agreed and written down, so we both know what good looks like	2 Content & setup Weeks 2 to 3 WHAT I DO - Sites and roles set up - Handbooks uploaded - Courses assigned WHAT THE CUSTOMER BRINGS Staff list from their HR system, site list, handbooks and policies DONE WHEN Every site and role set up, handbooks live, courses ready to assign	3 Staff rollout Weeks 3 to 4 WHAT I DO - Admins trained - Staff invited - Invite posters in staff rooms WHAT THE CUSTOMER BRINGS Ops sharing invites at team briefings, posters up in staff rooms DONE WHEN At least 70% of staff activated on the app	4 Training Weeks 4 to 5 WHAT I DO - Manager training done - Staff training sessions done WHAT THE CUSTOMER BRINGS Time from managers for training, one slot per site DONE WHEN Managers confident running it day to day, training being completed
5 Go-live Week 6 to 7 - 45-day target WHAT I DO - Launch comms sent - Go-live day support WHAT THE CUSTOMER BRINGS A launch message from leadership, so it comes from them DONE WHEN Launched, with me on hand on go-live day	6 First 90 days Week 8 to 10 WHAT I DO 30-day review - First QBR held WHAT THE CUSTOMER BRINGS 30 minutes for a review, then the first QBR DONE WHEN Goals checked against target, regular checkpoints booked in		

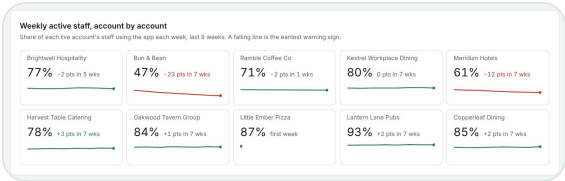
Six stages, each with what I do, what the customer brings and when it's done. An example I'd adapt to the team's process.

STEP 6

Adoption & health

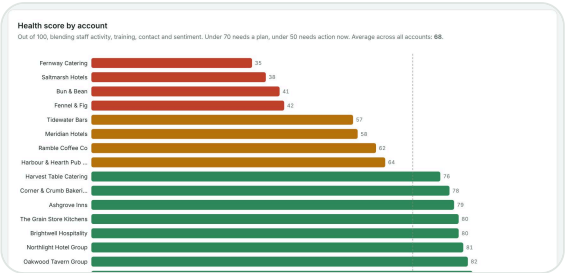
Whether customers are getting value after go-live.

Weekly active staff



A small chart per live customer. A falling line is the earliest warning sign.

Health score



Each customer's score out of 100. Under 70 needs a plan, under 50 needs action.

STEP 7

Renewals & growth

Keeping customers and growing with them.

● Book value

£350,000

Annual contract value, all accounts

● Expansion pipeline

£33,000

New sites and add-ons in play

● Gross revenue retention

92.7%

Last 12 months, after churn and downgrades

● Net revenue retention

108.1%

Last 12 months, including expansion

- 1 Total annual value of the book and the growth pipeline (new sites, new features).
- 2 GRR is what we kept after churn and downgrades. NRR adds the growth. Both cover the last 12 months.



Revenue movements each quarter: growth, downgrades and churn.

Upcoming renewals

Next 6 months, soonest first, with the next step for each.

Account	Renews	Value	Health	Next step
Bun & Bean	30 Nov in 38 days	£22,000	Red -41	Champion left in August, weekly active down from 74% to 47%
Oakwood Tavern Group	1 Dec in 39 days	£27,000	Green -82	Renew and expand: 6 new sites opening in spring 2027
Meridian Hotels	15 Dec in 53 days	£29,000	Amber -58	Usage down 12 points since a new HR director started, QBR not rebooked
Lantern Lane Pubs	13 Jan in 82 days	£14,000	Green -93	Renew and expand: Wants AI assistant add-on across all sites, happy to be a reference
Harvest Table Catering	1 Mar in 129 days	£28,000	Green -76	Renew and expand: Bidding on 12 new contracts and wants the app in the tender

Upcoming renewals, with health, so risky ones stand out.

STEP 8

Team

A shared space so the team can see what's been done and hand work to each other. The teammates are made up.

VD

Valentin (me)
Implementation & customer success · small & mid-market
19 customers in my book

SB

Sofie
Customer success · enterprise
Covering the Meridian intro on Thursday

EM

Elliot
Solutions engineer · enterprise
On site for an enterprise launch this week
2 shared tasks open

GA

Grace
Support lead
3 bugs with Product this week
1 shared task open

LH

Lukas
Account executive
2 deals closing this month

Team activity

Calls, tasks and fixes as they happen, so everyone can see what's been done. Anything I log or tick off shows up here.

VD

Valentin finished the HR integration set-up, so the remaining staff can be invited
Today · [Saltmarsh Hotels](#)

GA

Grace resolved LIN-488: the launch-day login issue is fixed for all 15 staff
Today · [Little Ember Pizza](#)

EM

Elliot answered Valentin's Microsoft SSO question and shared the enterprise SSO checklist
Yesterday · [Meridian Hotels](#)

SB

Sofie will cover the intro with Sarah Kent on Thursday while Valentin is training at Harbour & Hearth
Yesterday · [Meridian Hotels](#)

LH

Lukas new deal signed: Copper Kettle Cafés, 8 sites. Handover email sent, Kickoff to book
Yesterday

VD

Valentin shared the rescue plan with the team ahead of the 28 Oct renewal call
21 Oct · [Bun & Bean](#)

GA

Grace raised LIN-482 to P1 with Product: push notifications missing at 6 sites
21 Oct · [Bun & Bean](#)

VD

Valentin ran the kickoff and configuration workshop, sites and roles agreed
20 Oct · [The Grain Store Kitchens](#)

Shared tasks

Give a task to a teammate, or see what they've given me. Tasks given to me also land in my to-do list.

Given to me

Given by me

Whole team

☐ Let Gina know the launch-day login fix (LIN-488) is live
Grace → Valentin · [Little Ember Pizza](#) · due 26 Oct

☐ Ask Ellie if she's happy to be a reference for an enterprise prospect
Sofie → Valentin · [Lantern Lane Pubs](#) · due 29 Oct

☐ Review the tender pack together before Friday
Lukas → Valentin · [Harvest Table Catering](#) · due 29 Oct

Give to Sofie (Customer success)

Ashgrove Inns

What needs doing?

10/26/2026

Give task

- 1 **Team activity** shows what everyone has actioned. Anything you log, add or tick appears straight away, highlighted.
- 2 **Shared tasks:** filter by Given to me, Given by me or Whole team, and tick to complete.
- 3 **Give a task:** pick a teammate and a customer, write the task, set a date. You can also do it from any account page.

TIP In the prototype this saves on your device. In real life it would sync through the CRM or a shared workspace, with a ping in Slack or email.

STEP 9

Echo, documents and the QBR deck

Echo takes care of the admin so there's more time for customers. Everything it writes is in my voice and the company's.

Ask Echo

- 1 Click Ask Echo, then tap a suggestion or type a question.
- 2 Try: "What should I focus on today?", "Which renewals are at risk?", "Who has gone quiet?", "Prep my renewal call with Bun & Bean", "Am I overbooked?" or "What has Grace got on?"
- 3 Copy an answer to paste into an email or notes. Always check before sending.
- 4 New chat starts afresh.

TIP If Echo can't reach the AI, for example when you're not signed in to Claude, it answers from the dashboard data instead and says so.

E

Echo

Customer success AI assistant

New chat

x

Hi Valentin, I'm Echo, your AI assistant. I know every account on this dashboard, from kickoff to renewal: health, adoption, goals, sites, contacts, QBRs, renewals, expansion and your bookings. Ask me what to focus on, prep a call or renewal, or get a follow-up drafted.

Demo mode: Echo answers from the dashboard data here. Try the suggestions below.

Which renewals are at risk?

4 renewals in the next 90 days, worth £92,000. 2 need you:

- Bun & Bean renews on 30 Nov (£22,000), health 41. Champion left in August, weekly active down from 74% to 47%. The QBR is overdue, so book it now.
- Meridian Hotels renews on 15 Dec (£29,000), health 58. Usage down 12 points since a new HR director started, QBR not rebooked. The QBR is overdue, so book it now.

Oakwood Tavern Group (1 Dec) is safe at health 82. Growth to raise at the renewal: 6 new sites opening in spring 2027 (£7,000).

Lantern Lane Pubs (13 Jan) is safe at health 91. Growth to raise at the renewal: Wants AI assistant add-on across all sites, happy to be a reference (£4,000).

Conv.

What should I focus on today?

Which renewals are at risk?

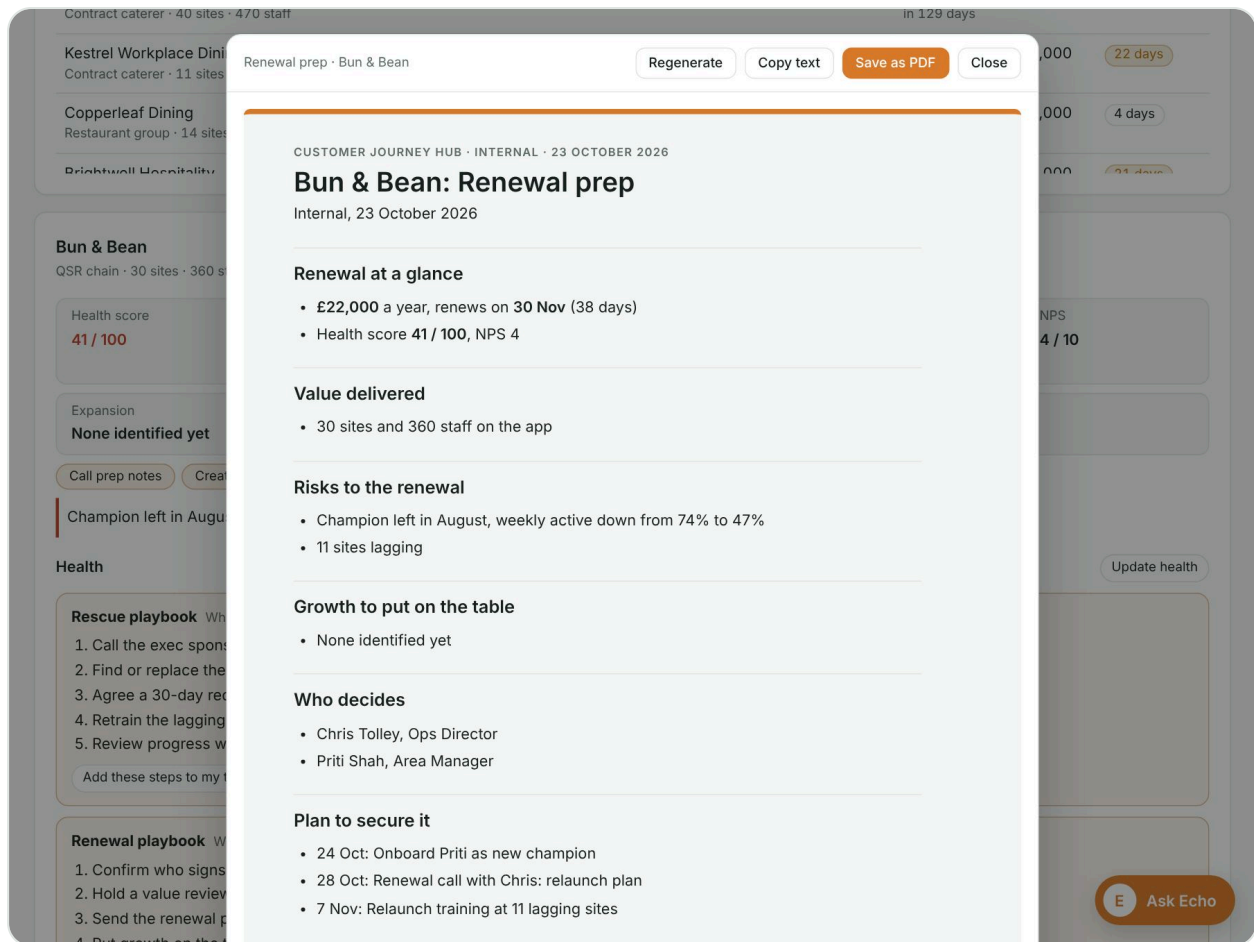
W

Ask Echo about your accounts

Send

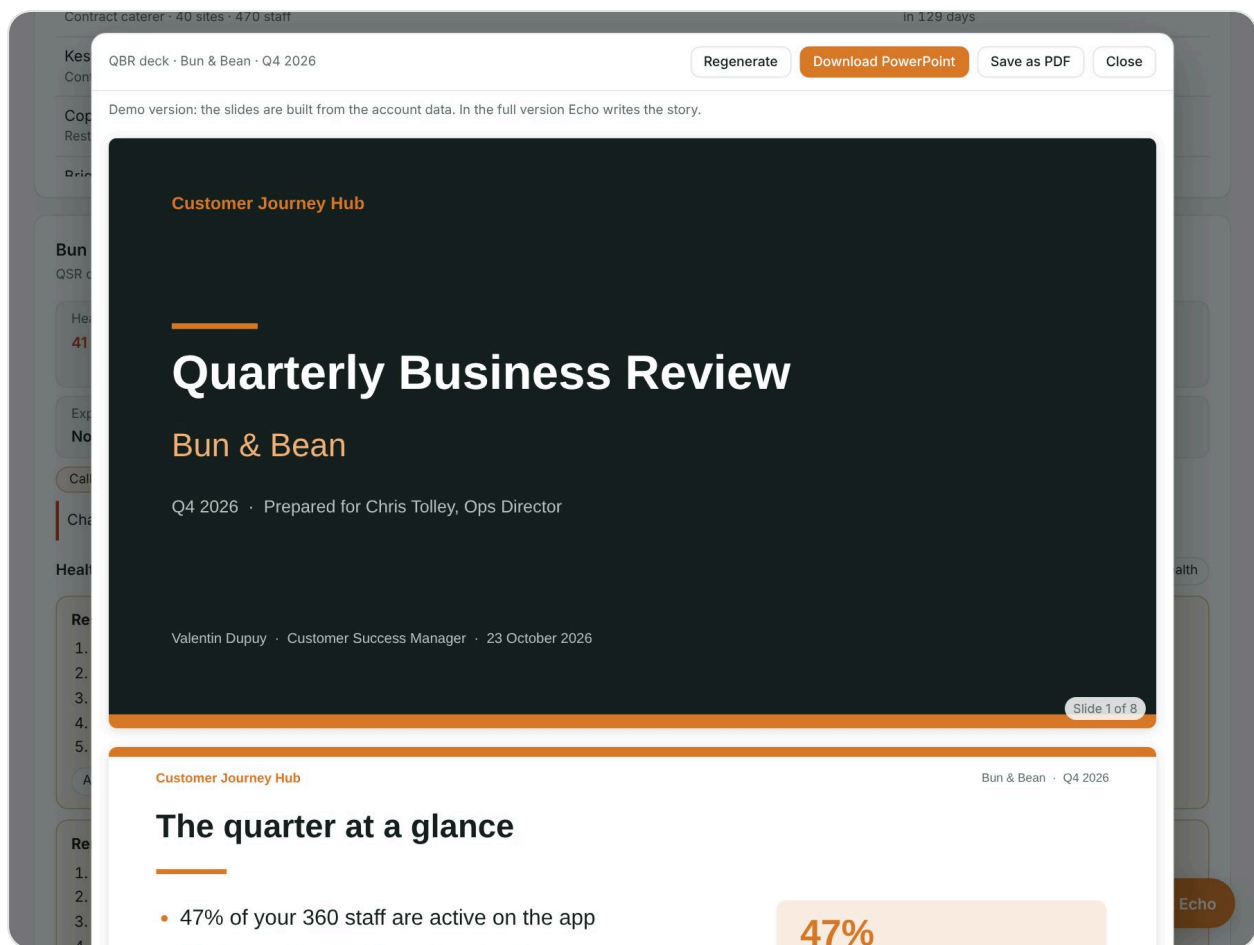
Works from the dashboard data. Check anything it drafts before you send it.

Documents, on any account page



- **Call prep notes:** the call in one line, what's changed, goals, open tasks, risks and questions to ask.
- **QBR document:** summary, adoption, wins, challenges, next quarter's plan and asks.
- **Renewal prep:** the renewal at a glance, value delivered, risks, who decides and the plan to secure it.
- Each opens with **Regenerate**, **Copy text** and **Save as PDF**.

QBR deck



Create QBR deck builds an 8-slide branded presentation for the customer: summary, adoption, wins, challenges, the plan and asks. Download it as **PowerPoint** to edit, or **PDF** to send.

STEP 10

A simple routine

Ten minutes each morning and half an hour on Friday keeps every customer covered.

Every morning

- ☐ Open Today and check the four key numbers
- ☐ Clear overdue tasks, or move their dates
- ☐ Open each account needing attention and use its playbook
- ☐ Ask Echo "What should I focus on today?"
- ☐ Check the Team feed for anything given to me

After every call or visit

- ☐ Log it on the account page
- ☐ Update health if anything changed
- ☐ Add the next step as a task, for me, the client or a teammate

Every Friday

- ☐ Onboarding: check go-lives and stuck customers
- ☐ Renewals & growth: renewals in the next 90 days and QBRs due
- ☐ To-do: check next week's workload for overbooking
- ☐ Write my weekly update, and prep next week's calls with Echo

Good to know

Is this real customer data?

No. It's a prototype with made-up customers. In real life the data would come from the CRM, emails and calendar, the platform's usage data and the support tool.

Can other people see my changes?

Not in the prototype. Changes are saved in your browser only.

Does it work on a phone?

Yes. Swipe the tab bar sideways to reach every tab.

How do I start over?

Use Reset demo data at the bottom of the dashboard, and click it twice to confirm.

Customer Journey Hub · a concept by Valentin Dupuy · prototype with made-up data