One-page customer-outcome account plan

Prioritize internal account actions using confirmed customer needs, delivered-value evidence and feasible resources.

Your reusable working template 1/2

1. Complete from authorized records and label each statement confirmed, supported but incomplete, or hypothesis.
2. Keep customer-facing information separate from confidential internal economics.
3. Ask delivery or support to challenge the current-state summary.
4. Choose no more than three initial priorities as a focus aid; update when evidence changes.

Account, current scope, delivery owner and important dates

Customer outcome and evidence status: source/date

Delivered output, actual use and unverified outcome claims

Open service issue and accountable resolution owner

A practical Tibyan working aid, not a validated assessment. Example is hypothetical; adapt decisions and figures to your context. Do not enter sensitive information in a shared copy.

One-page customer-outcome account plan

Prioritize internal account actions using confirmed customer needs, delivered-value evidence and feasible resources.

Your reusable working template 2/2

Relevant stakeholder roles, existing access and gaps

Possible initiative: need, evidence, economics and capacity

Priority: act now, investigate or defer, with reason

Action, owner, intended evidence, decision date and review trigger

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Completed hypothetical example 1/2

Account, current scope, delivery owner and important dates

Factory A; maintenance analytics at one site; delivery lead Omar; existing pilot.

Customer outcome and evidence status: source/date

Maintenance scheduling decisions; planning lead confirms report use,20 October.

Delivered output, actual use and unverified outcome claims

Dashboard delivered; weekly report used; downtime reduction not verified.

Open service issue and accountable resolution owner

Data-quality defect creates manual work; Omar responsible.

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Completed hypothetical example 2/2

Relevant stakeholder roles, existing access and gaps

Planning lead engaged; second site's maintenance owner not yet contacted.

Possible initiative: need, evidence, economics and capacity

Second-site pilot is a hypothesis; need unconfirmed; finance and capacity checks pending.

Priority: act now, investigate or defer, with reason

Act: resolve defect. Investigate: second-site need. Defer: two-site rollout.

Action, owner, intended evidence, decision date and review trigger

Omar confirms defect acceptance; Lina seeks introduction; finance evaluates limited pilot if demand confirmed; review after evidence changes.

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