

# The Brief, built your way

Custom Briefs let your team define what they need to know, and surface it instantly.

**⚡**

**QUICK REFRESHER:  
WHAT IS THE BRIEF?**

The Brief gives you instant, AI-powered context into the key details you'd normally spend hours hunting for, already summarised and ready when you open an account.

**Prepare My Next Meeting** Last updated today

Prepare for the next likely meeting in this account

**Next Likely Meeting**

Your upcoming meeting with StreamCo will focus on organizational stability following significant leadership turnover. With key champions Tom Hargreaves, Sarah (former Head of CS), and Luis (CRO) having departed, the discussion will center on identifying new decision-makers and ensuring partnership continuity. Expect questions about digital strategy clarity and how your AI features can deliver immediate value during this transition.

**Action Items**

- Secure executive alignment – Connect with Claire Whitmore to understand the new org structure and confirm decision-making authority post-changes
- Demonstrate immediate value – Present concrete ROI from the AI features rollout planned for next week, addressing the break clause risk (expires 2026-03-15)
- Establish new champion relationships – Work with Jordan to build relationships with Rafael, Bruno (Sales & GM), and emerging digital CS leaders to keep the partnership embedded in their strategy.

The standard briefs were just the start. Every CS team has unique questions they need answered before every call, so we made Custom Briefs. Now, teams can build and deploy any brief they need, unlocking instant, AI-powered context for whatever matters most to them, across each account.

## What Customers are Building



### EXEC ESCALATION

Give your leader context before they join a high-stakes call.



### QBR PREP

Everything you need for a strong business review.



### STAKEHOLDER MAP

Map influence and engagement across your whole account



### KEY COMPETITORS

Bring a competitive overview to your renewal conversation.



### CHAMPION ASSESSOR

Assess where your champions stand, identify any gaps to fill.



### MULTI-THREADER

Proactively expand relationships beyond your single champion.

**Champion Assessor** Last updated today

**Identified Champion**

- Jordan Kaplan, Senior Manager, CS Operations — Stage: Developing. Leads monthly ops syncs and deep technical engagement. Limited independent internal selling observed.

**Value Scorecard**

Value	Status	Evidence
Prospective Champions identified	Partial	Jordan and Nina show engagement but limited internal influence or access to Economic Buyer No clear evidence of direct access to Economic Buyer or ability to move decisions independently Clear pain around AI functionality, data accuracy issues, and efficiency tied to CS performance
Access & influence	No	
Pain identified	Yes	

**Key Gaps**

- No Economic Buyer access
- No internal advocacy
- No business case initiated

**Recommended Next Steps**

Qualify Jordan's access to budget authority, test champion behaviour by requesting internal stakeholder presentation, and initiate formal ROI analysis.