

CUSTOMER SUCCESS · TEMPLATE

30-Day Launch Recap

Delivered by CSM at Day 30 post-launch. Drives the first optimization cycle.

Section 1 — Launch Summary

FIELD	VALUE
Client	{{client.name}}
Go-live date	{{client.launchDate}}
Treatment categories live	{{client.categories}}
CSM owner	{{owner}}
Platform fee	{{client.fee}}

Section 2 — KPIs (Day 1-30)

METRIC	DAY 30 ACTUAL	TARGET	STATUS
Orders created	—	—	ON TRACK
Intake completion rate	—%	≥ 65%	ON TRACK
Checkout conversion	—%	≥ 55%	ON TRACK
Provider approval rate	—%	≥ 80%	ON TRACK
Avg. time to ship (Rx)	— hrs	≤ 72 hrs	ON TRACK
Support ticket volume / 100 orders	—	≤ 8	ON TRACK
Refund / chargeback rate	—%	≤ 1.5%	ON TRACK

Section 3 — Wins

- Three quantitative wins from the first 30 days.
- One qualitative quote from a stakeholder or patient.

Section 4 — Friction Points

- Issues observed (intake drop-off, payment failures, pharmacy delays, CX gaps).
- Root-cause + owner for each.

Section 5 — 60-Day Action Plan

ACTION	OWNER	TARGET DATE
Optimization #1	—	—
Optimization #2	—	—
Optimization #3	—	—

Delivery format: 25-min live call. Recording + this recap shared in shared workspace within 24 hours.