



SUNCOAST SPARK

Customer Value Review One-Pager

Do not report activity. Show what changed.

A concise resource for account executives, customer success managers, and account managers preparing a business-value conversation.

SPARK CATEGORY: KEEP

The Value Review Principle

Before you build your one-pager, understand the difference between what is easy to report and what is worth reporting.

Avoid leading with these alone

- Logins
- Meetings held
- Training completed
- Features enabled

These are activity signals. They tell you something happened — not that anything changed.

Only use them when they connect to

- A business result
- Risk reduction
- Time saved
- Revenue impact
- An adoption outcome
- A strategic objective

This is the standard your customer's executive team applies. Your review should meet it.

📌 The question to keep asking yourself: **so what?** If you cannot answer it for each data point, cut the data point.

The One-Pager

Complete each section before the customer conversation. Leave a field blank rather than fill it with speculation.

Customer
Period
Business Objective
Original Success Measure

What Has Changed

Describe one to three specific things that are measurably or observably different since implementation.

Evidence

What data, quotes, or observable outcomes support the change? Only include what you can verify or attribute.

Adoption Signals

Which usage patterns are meaningful — because they connect to the business objective, not because the numbers are large.

Customer Feedback

Direct quotes or paraphrased sentiment from stakeholders. Attribute accurately. Do not paraphrase as stronger than it was.

Open Risk

What is not yet working, at risk, or unresolved? Name it before the customer does.

Next Value Milestone

What is the next concrete outcome worth working toward together — and by when?

Executive Message

One to two sentences you could say to the economic buyer that summarizes the current state and forward direction. Write it here first.

Questions to Ask the Customer

Use these in the conversation to surface real signal — not to validate what you already wrote. Listen for what surprises you.

"What feels materially better?"

Opens with the customer's own frame of reference. Do not suggest the answer. Wait for them to name it.

"Where are you not yet seeing the value you expected?"

Gives the customer permission to be honest. Gaps named here are easier to address than gaps discovered later.

"What has changed since implementation?"

Surfaces context shifts — team changes, priorities, org restructuring — that may affect how value lands or how risk has shifted.

"Who else should be seeing this result?"

Identifies stakeholders who are not yet in the conversation. A positive answer opens expansion. A blank answer is a signal.

"What should we focus on next?"

Hands forward momentum to the customer. Their answer shapes the next value milestone more reliably than your assumption does.

Value vs. Activity

The difference is not the data. It is the connection to what the customer cares about.

	Activity Statement	Value Statement
Example 1	"87% of users completed training."	"Manager adoption increased enough that the customer has begun using the workflow as part of quarterly planning."
Example 2	"The team logged 42 support tickets this quarter."	"Issue resolution time decreased, and the ops team has reduced escalations to the vendor by handling more cases internally."
Example 3	"Six new features were enabled in the platform."	"Two of those features are now part of the customer's standard onboarding process for new hires."
Example 4	"Executive sponsors attended three quarterly reviews."	"Executive sponsor engagement has continued, and the team is now presenting outcomes upward — not just usage summaries."

📌 These examples are illustrative. Substitute your customer's actual evidence. Do not use a value statement you cannot support with at least one observable signal.



AE ON DEMAND

Customer value should be easier to explain than product usage.

AE on Demand helps structure customer outcomes, evidence, risks, stakeholder context, and next-value conversations — so you walk into every review prepared, not guessing.

What it helps you build

- Customer value narratives tied to business objectives
- Stakeholder context and risk summaries
- Next-value milestone framing
- Executive-ready messages

How it works

AE on Demand turns ChatGPT or Claude into a company-specific sales operating system — so you can decide what to do next and get help doing it.

Explore AE on Demand at aeondemand.com