THE RESULT

"A formality"? The customer wrote on November 27 that it's reviewing its options after March.

A new VP Sales at a 58,000-person industrial automation company gets up to speed on a $4.8M service account before her first customer meeting, with any AI chat her company allows.

THE RESULT Ines's one page for Thursday. Fictional company and customer.

TALVORA GROUP · BUILDING AUTOMATION SALES

Kestle account: briefing before Thursday

Meeting: Thursday, December 10, with Sanne de Vries
Contract term ends: March 31, 2027

WHERE IT STANDS

Kestle ($4.8M a year) emailed on November 27, four days before the contract's 120-day notice date of December 1. It is reviewing its options after March, including in-house service at its two new sites, and called the email formal notice that it wants to discuss terms. Legal decides whether that is notice of non-renewal. · Inputs 2, 3, 6

THE HANDOVER NOTE, AGAINST THE RECORD

Renewal **Not a formality** Nov 27 email; legal reads it	**"Old tickets"** **9 misses, Aug-Oct** Aug and Sept qualify for credits	**Flat price for 2027** **Nothing in writing** Price changes need written agreement	**New sites, $1.2M** **Unverified** Kestle may run them in-house

THURSDAY

SAY

We missed the 4-hour target in August, September and October, and credits are due
About $40K if the 5% applies to the full $400K monthly fee. Finance and legal confirm the basis; none were issued in 2026. · Inputs 2, 4, 6

DON'T

Promise a flat price, quote a 3.1% rise, or argue about the notice
The CPI uplift applies on April 1 during the term, and the term ends March 31, 2027. Legal confirms; 2027 price looks like a renewal term. · Inputs 2, 7

BEFORE THURSDAY

Legal reads the November 27 email. Mark says exactly what he told Kestle about price, and to whom. · Inputs 1, 2, 3

FORECAST

Renewal and new sites come out of Commit today
The customer's own email doesn't support either at that stage. They stay in the forecast at a lower stage. · Inputs 3, 5

CAUGHT ON REVIEW

1. Kestle's November 27 email says it's **reviewing its options after March**
2. August and September **qualify for service credits**; October doesn't
3. The April 1 uplift **only applies during the term**, which ends March 31, 2027

UC-005 · SC-02 · REV A	
FOR **VP Sales, Building Automation**	SECTOR **Industrial automation**
COMPANY **58,000 people · 40 sites**	TASK **Get up to speed on an inherited account before the first customer meeting**
WRITTEN FOR **ChatGPT · Claude · Gemini · Copilot**	
AI TEST **Claude, Nov 14, 2026 · 7 of 7 found**	

STEP 0 · THE MESS

What landed on Ines's desk

A confident handover note, one contract clause, the customer's latest email, a response-time export, two forecast lines, the billing summary and a pricing analyst's question. The dates and the customer's words do the work.

HANDOVER NOTE [1]

From Mark

“The renewal on March 31 is a formality … Only open issue is a couple of old tickets.”

1 **Five claims.**

CONTRACT EXTRACT [2]

Signed April 1

Notice of non-renewal at least 120 days before the end of the term.

2 **Which date?**

EMAIL · CUSTOMER [3]

November 27

“We are also reviewing our options after March … our formal notice.”

3 **Their words.**

RESPONSE-TIME EXPORT [4]

Rotterdam

Target missed: 3, 4, 2, 0.

4 **More than twice?**

CRM FORECAST [5]

Two lines

Renewal $4.8M, Commit. New sites $1.2M, Commit.

5 **Both Commit?**

FINANCE SUMMARY [6]

Billing

Billed monthly at $400K … Service credits issued in 2026: none.

6 **Owed?**

TEAMS · PRICING [7]

CPI uplift

“The CPI uplift for Kestle on April 1, 2027 would be about 3.1%.”

7 **After the term?**

YOU'RE NOT ALONE

8.6%

of contract value is lost on average through weak contracting and contract management.

World Commerce & Contracting with Deloitte, The ROI of Contracting Excellence, 2023 (more than 1,200 organizations). Source

STEPS 1–3 · HOW IT WORKS

Three steps, one chat

Here the AI helps you learn an account you've just inherited. The prompt tells it to read the handover note last.

1 Open a new chat

Use the AI tool your company approves: ChatGPT, Claude, Gemini or Copilot.

2 Paste the prompt and the inputs

Copy the prompt and the seven fictional inputs from the appendix into one message.

3 Check the dates yourself

Count back from the contract end date to the notice date, and put the customer's email next to it. Then decide what you'll say on Thursday and what goes to legal and finance first.

THE PROMPT, PART BY PART

COPY-READY VERSION IN THE APPENDIX

I've just taken over a large customer account as VP Sales at an industrial automation company. The previous account owner has moved to another role and left me a handover note. My first meeting with the customer's Head of Facilities is on Thursday, December 10. Today is Monday, December 7. Below are his handover note, the contract extract, the customer's latest email, the response-time export, our forecast lines, the account's finance summary and a message from our pricing analyst.

1 Who you are, that you're new to the account, when you meet the customer and today's date.

Please help me get up to speed:

1. **What I need to know**, in five lines.
2. **Each claim in the handover note**: supported, contradicted or unverified, with the input that shows it.
3. **What I shouldn't say or promise** on Thursday, and why.
4. **Questions to settle before Thursday**, and who in my company should answer each one.
5. **What's missing** from the inputs.

2 Five parts: what to know, each handover claim checked, what not to promise, questions and who answers them, and what's missing.

Read the handover note last: check each of its claims against the contract, the dates and the customer's own words. Don't add facts that aren't in the inputs; if you assume something, say so. Name the input for each point.

3 The heavy lifting: read the handover note last and check each claim against the contract, the dates and the customer's own words. In this run it found all seven planted problems.

WHERE TO PASTE

Every tool has one message box. Paste the prompt, add a blank line, paste the inputs, send. Contracts and exports can be attached as files if your tool allows it.

SAFE TO TRY

Practise with the fictional inputs first. Real contracts, customer emails and pricing are confidential: use only your company's approved tool and follow its rules on customer information.

THE AI'S FIRST ANSWER

What Claude actually wrote

Exactly as it came back, not edited. Read it the way Ines did: check each point against the source it cites.

UNEDITED Claude · fresh session, no other context · Nov 14, 2026 · one run

1. What you need to know, in five lines C: one page

1. This renewal is not a formality. Kestle says it is "reviewing our options after March", including running service in-house at the two new sites, and it gave "formal notice that we want to discuss terms before any renewal" (input 3, Nov 27). found
2. The contractual notice deadline has passed. 120 days before March 31, 2027 is December 1, 2026, and Kestle's email arrived on November 27, four days earlier (inputs 2 and 3). Whether that email counts as notice of non-renewal is a legal question.
3. Kestle is owed service credits that haven't been paid. Under the contract, August (3 misses) and September (4) qualify. October (2 misses) does not, because the rule is "more than twice". If the monthly fee is the full $400K, that comes to 2 × 5% × $400K = $40K. Finance shows no credits issued in 2026 (inputs 2, 4 and 6). found
4. Mark's "flat price for 2027" has no written agreement in the inputs. The contract says any price change must be agreed in writing by both parties (inputs 1, 2 and 7).
5. Both forecast lines are at Commit: $4.8M renewal and $1.2M new sites. The customer's own words don't support either one at that stage (inputs 3 and 5). found

2. Handover note claims (input 1), checked

Claim	Verdict	Input that shows it
"$4.8M a year"	Supported	6: $400K × 12 = $4.8M. Jan–Nov billed $4.4M = 11 × $400K
"Our biggest service account"	Unverified	No comparison with other accounts in the inputs
"Renewal on March 31"	Supported, with the year added	2: the term ends March 31, **2027**
"Renewal is a formality"	Contradicted	3: "reviewing our options after March", "formal notice… discuss terms before any renewal"
"They're happy with us"	Contradicted	3: lists 9 missed targets and expects service credits
"I told them their price stays flat for 2027"	Unverified that it was said. Not binding unless it's in writing	2: "Any change to prices must be agreed in writing by both parties". 7: Leo asks "Did anyone sign anything?" No signed document is in the inputs found
"Expansion to two new sites ($1.2M) is basically agreed"	Contradicted	3: Kestle is considering "running service in-house at the two new sites" found
"…and it's in the forecast"	Supported	5: $1.2M, Commit, close Jan 15, 2027. Being in the forecast doesn't make it agreed
"Only open issue is a couple of old tickets"	Contradicted	4 and 3: 9 missed targets from Aug to Oct, the most recent only six weeks ago, plus a credit claim and a formal request to renegotiate. 6: credits unpaid found

3. What not to say or promise on Thursday

- **Don't call the renewal routine or assume it.** The customer has put it in question in writing (input 3).
- **Don't confirm a flat price, and don't announce a 3.1% rise either.** No written agreement exists in the inputs (inputs 2 and 7). There's also a timing problem with Leo's figure: the contract applies CPI rises on April 1 "during the term", and the term ends March 31, 2027. So an April 1, 2027 price is really a renewal term, not an automatic uplift. That's my reading of input 2, so check it with legal. Leo's $149K figure (3.1% × $4.8M ≈ $148.8K) is arithmetically consistent, but its contractual basis is unclear. found
- **Don't promise a credit amount, and don't agree to three months.** The contract test ("more than twice") covers August and September but not October (inputs 2 and 4). Also don't deny credits are owed: none have been issued (input 6). Confirm the figure with finance first. The $40K assumes the 5% applies to the whole $400K monthly fee, not to a Rotterdam share. A: say it plainly
- **Don't say the response problem is fixed.** November shows 0 misses (input 4), but that is one month.
- **Don't argue in the meeting about whether their email was valid notice.** Get a legal view first (inputs 2 and 3).
- **Don't treat the new sites as agreed or give a January 15 date.** That date comes only from the CRM (input 5), and the customer is weighing in-house service (input 3).
- **Don't call the misses "a couple of old tickets"** (input 1 against inputs 3 and 4).

4. Questions to settle before Thursday, and who answers

Question	Who
Does the Nov 27 email count as non-renewal notice under the 120-day clause? What happens on April 1, 2027 if no new terms are agreed (auto-renewal, lapse)?	Legal / contracts
Does any price rise apply on April 1, 2027, given the term ends March 31?	Legal, with Leo Barros (pricing)
Exactly what did Mark tell Kestle about price, when, and to whom? Was anything written or signed?	Mark Lindqvist
Did anyone reply to Sanne's Nov 27 email?	Mark Lindqvist
What credits are owed (my calculation is $40K for Aug and Sep)? Is the 5% on the full $400K? Why were none issued?	Finance / billing, with legal on the clause
Was the April 1, 2026 CPI rise applied? Billing stayed at $400K a month all year (input 6)	Finance, with Leo Barros
What caused the Aug–Oct misses, and is November's 0 a real fix? Are other Kestle sites affected?	Service operations / delivery lead
What is the real status of the new-sites deal (proposal, contact, documents)? Should both lines stay at Commit?	Mark Lindqvist, then sales ops / forecast owner `B: move the forecast`

5. What's missing from the inputs

- Any reply to Kestle's Nov 27 email
- Written evidence of the flat-price statement, or any signed change
- The contract's full renewal mechanics: auto-renewal, how notice must be given, how credits are claimed and by when
- Response-time data for Kestle's other sites, and the causes of the misses
- Whether the $4.8M covers Rotterdam only or several sites
- Any proposal, pricing or customer correspondence for the $1.2M expansion
- Which "old tickets" Mark meant
- Who at Kestle decides the renewal besides Sanne, and their timeline
- How their in-house option compares on cost or capability
- Whether the April 2025 and April 2026 CPI rises were applied

Assumptions I made: the year is 2026, so Dec 1, 2026 is the notice deadline and Thursday is Dec 10, 2026; "monthly fee" means $400K; Rotterdam is the site the credit clause is measured on.

`found` caught a planted problem `A–C` Ines changes it; see the next section

THE HUMAN PART

What Ines changed, and why

Claude found every planted problem and sent the legal and finance questions to the right people. Ines's edits give her something to say on Thursday, act on what she now owns, and cut it to a page. She also softens one verdict: the customer's email puts the new sites in doubt, it doesn't rule them out.

WHAT CLAUDE FOUND: 7 OF 7 PLANTED PROBLEMS

One run

- ✓ The renewal isn't a formality
- ✓ "Old tickets" trigger credits
- ✓ The credit basis is unknown
- ✓ The flat price isn't in writing
- ✓ The new sites aren't agreed
- ✓ The uplift falls after the term
- ✓ Commit isn't supported

THREE EDITS, ALL JUDGMENT CALLS

	CLAUDE WROTE	INES'S VERSION	WHY · TONE
A	"Don't promise a credit amount, and don't agree to three months. … Also don't deny credits are owed"	**Ines opens on the misses herself: "We missed the 4-hour target in August, September and October. Credits are due under the contract; finance is confirming the amount."**	The customer raised it first, in writing. A list of things not to say leaves her nothing to say. Owning the misses is true, costs nothing the contract doesn't already require, and starts the relationship honestly.

	CLAUDE WROTE	INES'S VERSION	WHY · DECISION
B	"What is the real status of the new-sites deal … Should both lines stay at Commit?" (a question for Mark, then sales ops)	**Ines moves the renewal and the new sites out of Commit today. Both stay in the forecast at a lower stage until the customer says otherwise.**	The forecast is hers now. The customer's own email doesn't support Commit for either line, and that doesn't need anyone else's answer.

	CLAUDE WROTE	INES'S VERSION	WHY · LENGTH
C	Several pages: five lines, nine claims checked, seven don'ts, eight questions and ten missing items.	**One page: where it stands, the handover note against the record, and what to say, not say, settle first and change in the forecast.**	She needs something she can glance at before the meeting. The full check stays in her notes for the follow-ups with legal, finance and Mark.

What only you can do Decide what you'll own out loud, change what is now yours to change, and send contract questions to the people who can answer them. The AI checked the note. You build the relationship.

YOUR TURN

Make it yours

Use it whenever you inherit something with a handover note: a customer account, a supplier contract, a project, a team, a budget line.

YOUR PROMPT: FILL IN THE BRACKETS

I've just taken over **[the account, contract or project]** as **[your role]** at a **[industry]** company. **[Who]** has moved on and left me a handover note. My first meeting with **[whom]** is on **[date]**. Today is **[date]**. Below are **[the handover note, the contract or agreement, the latest emails, service or delivery data, the forecast or plan, the billing or budget, and any internal messages]**.

Please help me get up to speed: **1. What I need to know**, in five lines. **2. Each claim in the handover note**: supported, contradicted or unverified, with the input that shows it. **3. What I shouldn't say or promise**, and why. **4. Questions to settle before the meeting**, and who in my company should answer each one. **5. What's missing** from the inputs.

Read the handover note last: check each of its claims against the contract, the dates and the other side's own words. Don't add facts that aren't in the inputs; if you assume something, say so. Name the input for each point.

FIVE CHECKS BEFORE THE MEETING

1. Every date in the contract is counted out, including notice periods.
2. The other side's own words are read before anyone's summary of them.
3. Promises nobody wrote down are confirmed with the person who made them.
4. Contract and credit questions have gone to legal and finance.
5. The forecast reflects what the customer has said, not what the note hopes.

MAKE IT REPEATABLE (OPTIONAL)

Save the prompt once and reuse it whenever you inherit something: a custom GPT in ChatGPT, a project in Claude, a Gem in Gemini, or an agent in Copilot. Some companies switch these off; copy and paste always works.

WITH REAL DATA

Contracts, pricing and customer emails are confidential. Use only the AI tool your company approves, follow its rules on customer information, and take contract questions to your legal team.

WHAT THIS EXAMPLE SHOWS

One run of this prompt in Claude found all seven problems planted in fictional inputs and sent the contract questions to legal and finance.

WHAT IT DOESN'T SHOW

That every tool, setting or run will do the same, how much time it saves you, or how any contract should be read. Talvora Group, Kestle Data Centres and their people are fictional.

APPENDIX

Copy-ready: the prompt and the seven inputs

Copy the prompt, then all seven inputs, into one message in a new chat. Everything here is fictional and safe to paste.

THE PROMPT

I've just taken over a large customer account as VP Sales at an industrial automation company. The previous account owner has moved to another role and left me a handover note. My first meeting with the customer's Head of Facilities is on Thursday, December 10. Today is Monday, December 7. Below are his handover note, the contract extract, the customer's latest email, the response-time export, our forecast lines, the account's finance summary and a message from our pricing analyst.

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5. **What's missing** from the inputs.

Read the handover note last: check each of its claims against the contract, the dates and the customer's own words. Don't add facts that aren't in the inputs; if you assume something, say so. Name the input for each point.

[1] HANDOVER NOTE FROM MARK LINDQVIST

Kestle is our biggest service account, $4.8M a year. The renewal on March 31 is a formality; they're happy with us. I told them their price stays flat for 2027. The expansion to their two new sites ($1.2M a year) is basically agreed and it's in the forecast. Only open issue is a couple of old tickets.

[2] SERVICE CONTRACT (EXTRACT), SIGNED APRIL 1, 2024

The term ends March 31, 2027. Either party may give notice of non-renewal at least 120 days before the end of the term. Prices rise each April 1 during the term by the change in CPI, capped at 4%. Any change to prices must be agreed in writing by both parties. Service credits: 5% of the monthly fee for each month in which the 4-hour response target is missed more than twice.

[3] EMAIL FROM SANNE DE VRIES, HEAD OF FACILITIES, KESTLE, FRIDAY, NOVEMBER 27

Mark, following our call. Your team missed the 4-hour response target at our Rotterdam site three times in August, four times in September and twice in October. We expect the service credits under the contract. We are also reviewing our options after March, including running service in-house at the two new sites. Please treat this email as our formal notice that we want to discuss terms before any renewal.

[4] RESPONSE-TIME EXPORT, ROTTERDAM SITE

Month	Calls	4-hour target missed
August	41	3
September	38	4
October	44	2
November	40	0

[5] CRM FORECAST LINES, KESTLE

Opportunity	Value per year	Stage	Close date
Kestle renewal, 2027	$4.8M	Commit	March 31, 2027
Kestle new sites (2)	$1.2M	Commit	January 15, 2027

[6] ACCOUNT FINANCE SUMMARY

Annual fee: $4.8M, billed monthly at $400K. Revenue billed January to November 2026: $4.4M. Service credits issued in 2026: none.

[7] TEAMS MESSAGE FROM LEO BARROS, PRICING ANALYST

FYI, the CPI uplift for Kestle on April 1, 2027 would be about 3.1%, roughly $149K a year. Mark told them flat. Did anyone sign anything?