SAMPLE · AI SUMMARY WITH TRANSCRIPT

Q1 Planning, Breakout 3

Wednesday, January 13, 2027 · 52 minutes · 6 speakers · Instructions: Team Meeting

KEY POINTS

- The team agreed to move the customer onboarding launch from March 3 to March 17 to finish testing.
- Support needs two more trained staff before launch, and one new hire is approved.
- Regional managers asked for a shared dashboard of weekly numbers.

ACTION ITEMS

- [ ] **Priya R.** will send the revised launch timeline to all regional managers by Friday, January 15.
- [ ] **Marcus L.** will post the support job description by January 20.
- [ ] **Jordan E.** will bring two dashboard options to the next meeting.
- [ ] **Dana O.** will close the three open test issues before the new launch date.
- [ ] **No owner yet:** Training the new support hires

SUMMARY

Most of the breakout went to the onboarding launch. Dana O. walked through the test results: three issues are still open, and two of them affect customers in their first week. The group agreed that a two-week delay was safer than launching with open issues, and Priya R. took on telling the regional managers.

Marcus L. raised staffing in support. One new hire is approved, but support needs two trained people before launch, and nobody in the room took on training them. Jordan E. ended with the regional managers' request for one shared dashboard of weekly numbers, and will bring options next time.

TRANSCRIPT

Priya R.: Thanks, everyone. Let's start with the launch date, since everything else depends on it.

Dana O.: Testing found three issues we haven't closed. Two of them hit customers in their first week, so I don't think we should launch on March 3.

Marcus L.: If we move it two weeks, support can be ready too. Right now we'd be short.

Priya R.: Then let's plan on March 17. I'll take the timeline and send it to the regional managers Friday.

Dana O.: That gives me time to close all three. I'll confirm before the new date.

Marcus L.: On staffing, we have one new hire approved. We need two people trained before launch.

Speaker 6: Who's training the new hires?

Marcus L.: Good question. I can post the job description by the twentieth, but training is open.

Jordan E.: One more thing from the regional managers. They keep asking for a single dashboard with weekly numbers.

Priya R.: Can you bring a couple of options next time?

Jordan E.: Sure, I'll bring two.
