If you work within Customer Success it is likely that you have heard the phrase ‘a single source of truth’. The phrase refers to having a single system/source within your business, which acts as the master record for information on your clients. Companies of all sizes are known for having multiple systems in place that hold different pieces of information on their clients. A single source of truth refers to having one key system that holds, or links to all data on the client at anyone time. This means that everyone within the business that needs access, can have access to the latest information on the client at anytime. But with many clients liaising with your business via different tools, it is important that your clients have access to a single source of truth as well. A single source of truth for **all**, and not just for inside your business.

> On average, companies with fewer than 1,000 employees run an average of 22 custom applications. The largest enterprises with more than 50,000 employees run 788, on average.
>
> *(McAfee, 2017)*

Depending on the size and type of business you are working in it is likely that your clients communicate with you via several different means. For example: email, telephone, web conference, physical meetings, support ticket systems and so on. To complicate things further, your business might be communicating with several different people within your clients business. For example, Project Lead, Accounts, and IT.

During these different communication channels there are likely a number of topics being discussed, decisions being made and actions required. But can your clients easily find what was agreed? What was discussed? What actions are pending and what actions have been completed? Was it discussed via email, on the phone or at a meeting?

A single source of truth for your clients

Giving your clients a single source of truth can make for a happier relationship. A single source that they can check as a quick record of discussions, decisions and outstanding/completed actions. It also makes a good and consistent starting point for regular check-in meetings.For example: check and review last meeting notes and actions from the last meeting.

Shared Google Doc

You don’t need an elaborate system to achieve this. Personally, I find the best way to achieve this is by creating a shared Google Doc. With a Google Doc you can share it with specific users within your business and your clients. Log all changes, set and assign tasks, and both yourself and your client can update the document. As its an online document, it is also live, which means everyone is seeing the same document and not an outdated version.

The document does not need to contain a lot of additional details, but just key topics, decisions, actions and where more information on the subject can be found. E.G. Is there an email you can reference, support ticket or additional meeting notes.

I have personally found benefits in having a mutually accessible live document between yourself and your clients. It makes communication more efficient and ensures you are both on the same page.

I would love to hear your thoughts on this, comment below or please get in touch.