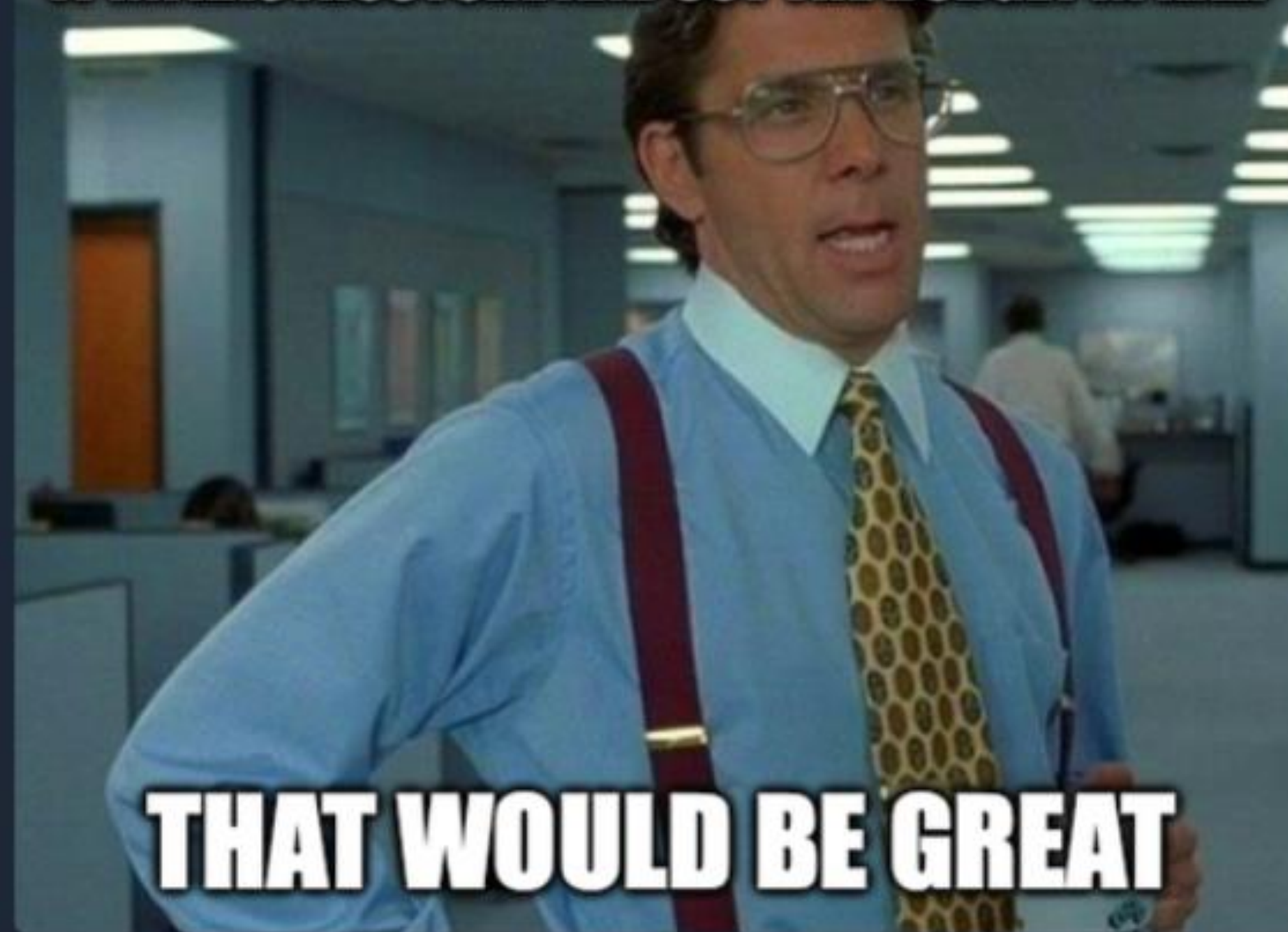


FORA

**IF YOU COULD JUST REVOLUTIONIZE OUR
IT INFRASTRUCTURE AND CUT THE BUDGET IN HALF**



THAT WOULD BE GREAT

add innovation

cut budget



GenAI Wave 1
bells & whistles



GenAI Wave 2
outcome-driven

**workflow
automation**

**content
generation**

GenAI Wave 1

**RAG
search**

CMS

**training &
certification**

LMS

GenAI Wave 2

onboarding

enablement

**meeting
recording**

**meeting
recording**

training &
certification

LMS

**best-of-breed
niche apps**

onboarding

enablement

CMS



**AI-driven
platforms**

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**meeting
recording**

**training &
certification**

LMS

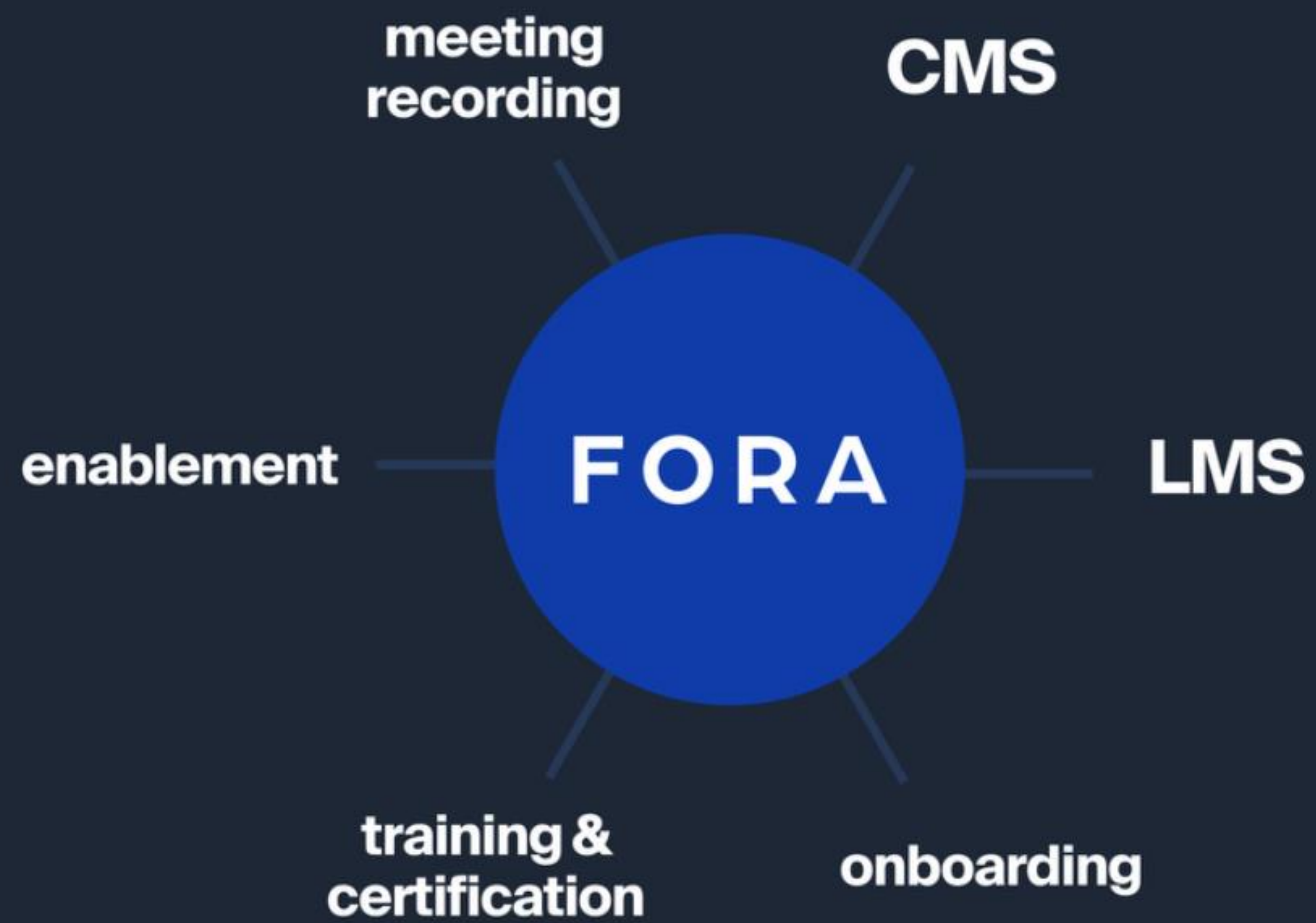
onboarding

enablement

CMS



FORA



org chart



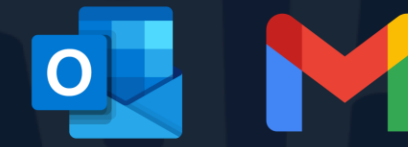
calendar



meetings



email



chat



CRM



FORA

FORA

Agenda

10:07 AM

Wednesday, May 29

9:00-10:00 am Short Content Time

9:00-10:00 am Zack and Joe AM check in

9:00-10:00 am • 7 min

Customer Success Plan

Meeting Details

Positioning FORA as Key Tech for Turnarounds

- Erica discussed office space utilization
- FORA team 27 initiated content creation for thought leadership
- Sydney conducted research on inflection points in companies
- ...

Joe Eisenfeld, John Bruno and 1 more external

Recording

9:00-10:00 am Office Wi-Fi Renewal

9:00-10:00 am Facilities Update

10:00-11:30 am Release Date Discussion

11:30-12:00 pm Joe / Sloane

1:00-1:30 pm Nylas <-> Fora

2:00-3:45 pm Product / Customer Feedback Checkin

4:00-4:30 pm Lenses Technical Architecture Discussion

Overview People Orgs

Meetings 8 Total (6h 30m)
6 Internal (4h) • Details
2 External (2h 30m) • Details

Availability 2h 30m
3 Sets • Details

PEOPLE

- Joe Eisenfeld
CEO & Co-founder, FORA
- John Bruno
Enterprise Sales, FORA
- Zach Elias
Head of Product & Co-founder, FORA
- Josh Cox
Head of Design, FORA
- Brian Parrish
Staff Developer, FORA
- Arnie Hall
EVP, Operations, Site Tracker

[See 12 More](#)

ORGANIZATIONS

- Asana
2 Meetings • 4 Previous Meetings
- FORA
5 Meetings
- Site Tracker
1 Meeting

Meeting Recording



Slack Digest Details

 **Daily Eng Digest**
Thursday, June 20, 8:30 pm · 37 min ago

 Summarized 5 channels ...

YOUR PERSONAL SUMMARY

 **Engineering Team Tackles Deployment, Bug Fixes, and Process Updates** ...
 Design Review Thu, Jun 20, 11:00 am

-  **Cynthia Susairaj introduced a new ticket estimation process**
Cynthia Susairaj in #eng channel proposed using the Fibonacci sequence for story points in JIRA.
-  **Vinnie Vendemia communicated upcoming unavailability**
Vinnie Vendemia announced in #eng channel a day's absence with a return scheduled for the following day.
-  **Successful deployments for 'toraday' in 'te-updates' channel**
Multiple successful deployments of 'toraday' were reported in 'te-updates' channel.
-  **Brian Parrish confirmed stability in Fora frontend**
Brian Parrish in #e-eng channel assured that recent frontend bugs will not affect the global airline industry.
-  **GitHub user activity observed without specific updates**
Activity from GitHub users was noted in #e-eng channel, however, no detailed messages were provided.

 **Detailed Summary** ...
 Design Review Thu, Jun 20, 11:00 am

-  In #eng channel, Cynthia Susairaj introduced a new process for story points using the Fibonacci sequence for ticket completion in JIRA, with a meeting scheduled for clarification.
-  Vinnie Vendemia announced in #eng channel he will be out for the day but will return online tomorrow.
-  #te-updates channel had multiple successful deployments of 'toraday' with details provided, including 850 in

Overview · People · Organizations

TABLE OF CONTENTS

-  Personal Summary
-  Detailed Summary
-  Prior Slack Digests

PEOPLE

-  **Joe Eisenfeld**
CEO & Co-founder, FORA
-  **John Bruno**
Enterprise Sales, FORA
-  **Zach Elias**
Head of Product & Co-founder, FORA

[See 3 More](#)

COMPANIES

-  **Site Tracker**
1 Meeting

Chat

- 
- 
- 
- 
- 

Meeting Details

Design Review Attended
Thursday, June 20, 11:00-11:45 am - 37 min ago

Summarized View Transcript View Video ...

YOUR PERSONAL SUMMARY

- Enhance User Interaction with Real-Time Updates and Visual Clarity**
Design Review Thu, Jun 20, 11:00 am
- Focus on Visualizing Summarized Data**
Joe Esserfeld emphasized the importance of visualizing summarized data, suggesting the use of heat maps for people or meetings. Simple visualizations like organizational charts were highlighted to manage and view the span of control. A baseline visualization tool within the system was deemed essential.
 - Creation of a 'Summary of Summaries' Feature**
The team discussed creating a 'summary of summaries' feature tailored to the user's role. The feature should be personalized and impactful, with a homepage summarizing current events and updates. The concept of a 'cherry' was introduced to enhance the homepage.
 - Hero Story Concept for Summarizing Data**
Joe Esserfeld proposed a 'hero story' to summarize current state data using a three-panel format. Josh and Kim were tasked with figuring out the specifics of the panel format. The project would work within the constraints of available imagery.
 - Consistent Branding Using Iconography**
Josh Coe proposed consistent branding for company, team, and individual sections using iconography instead of stock photos. The team agreed to start with a single summary on the homepage, featuring profile pictures, company logos, and a main headline, followed by iterative improvements.
 - Discussion on New Marketing Video**
Joe Esserfeld and Josh Coe agreed to discuss the new marketing video later, with structured feedback to be provided by Joe and John. The importance of the transition in the marketing video, particularly after the first 22 seconds, was highlighted. The actual site, which looks better than the abstract version, should be featured.

Potential Takeaways

Overview People Organizations

TABLE OF CONTENTS

- Meeting Summary
- Takeaways & Follow-ups
- Meeting Timeline
- Meeting Prep
- Prior Meetings
- Meeting Transcript

PEOPLE

-  **Joe Esserfeld**
CEO & Co-founder, FORA
-  **John Bruito**
Enterprise Sales, FORA
-  **Zach Elias**
Head of Product & Co-founder, FORA

[See 3 More](#)

COMPANIES

-  **Site Tracker**
1 Meeting

Insights for Meeting Participants

- 
- 
- 
- 
- 

 Business Roundtable ...

FORA Gains Momentum with Positive Sales Calls Amid Customer Feedback and Product Enhancements

WED, MAY 22 • TurboTax-like AI simplifies FORA user input

This report synthesizes insights from recent discussions and strategic meetings at FORA, focusing on enhancing customer success. It delves into technical troubleshooting, strategic planning, user engagement, and operational efficiency, with the aim of improving the platform's usability and integration capabilities. The objective is to provide a comprehensive overview of initiatives designed to ensure an effective user experience on the FORA platform.

TECHNICAL TROUBLESHOOTING AND INTEGRATION

The report highlights key discussions on improving recording and transcript accuracy, led by Vinnie Vendemia, emphasizing the importance of backend checks and the recall function's effectiveness. Additionally, strategies for automating grant refreshes to enhance user experience and concerns about data manipulation during updates were explored by Vendemia and David Small. Integration efforts with external platforms like Salesforce and Asana were also discussed, focusing on maintaining consistency in serverless implementations and exploring scalable solutions for initiative mapping.







STRATEGIC PLANNING AND USER ENGAGEMENT

Zack Elias and Kim Harrell's discussions on technical solutions to enhance user experience, including calendar connection improvements and permission upgrades, are detailed. The report also covers strategies by John Bruno and Zack Elias to simplify user input for AI prompts, aiming to create a more intuitive experience akin to TurboTax, balancing automation with manual processes. The significance of operational efficiency and customer onboarding processes was underscored in discussions by Joe Esserfeld and John Bruno, highlighting the importance of integrating customer setup processes seamlessly.







CONCLUSION

The initiatives and discussions outlined in this report underscore FORA's dedication to enhancing customer success through technical innovation, strategic planning, and operational efficiency. By addressing technical challenges, enhancing the user experience, and streamlining the customer onboarding process, FORA is committed to providing an effective and seamless experience for

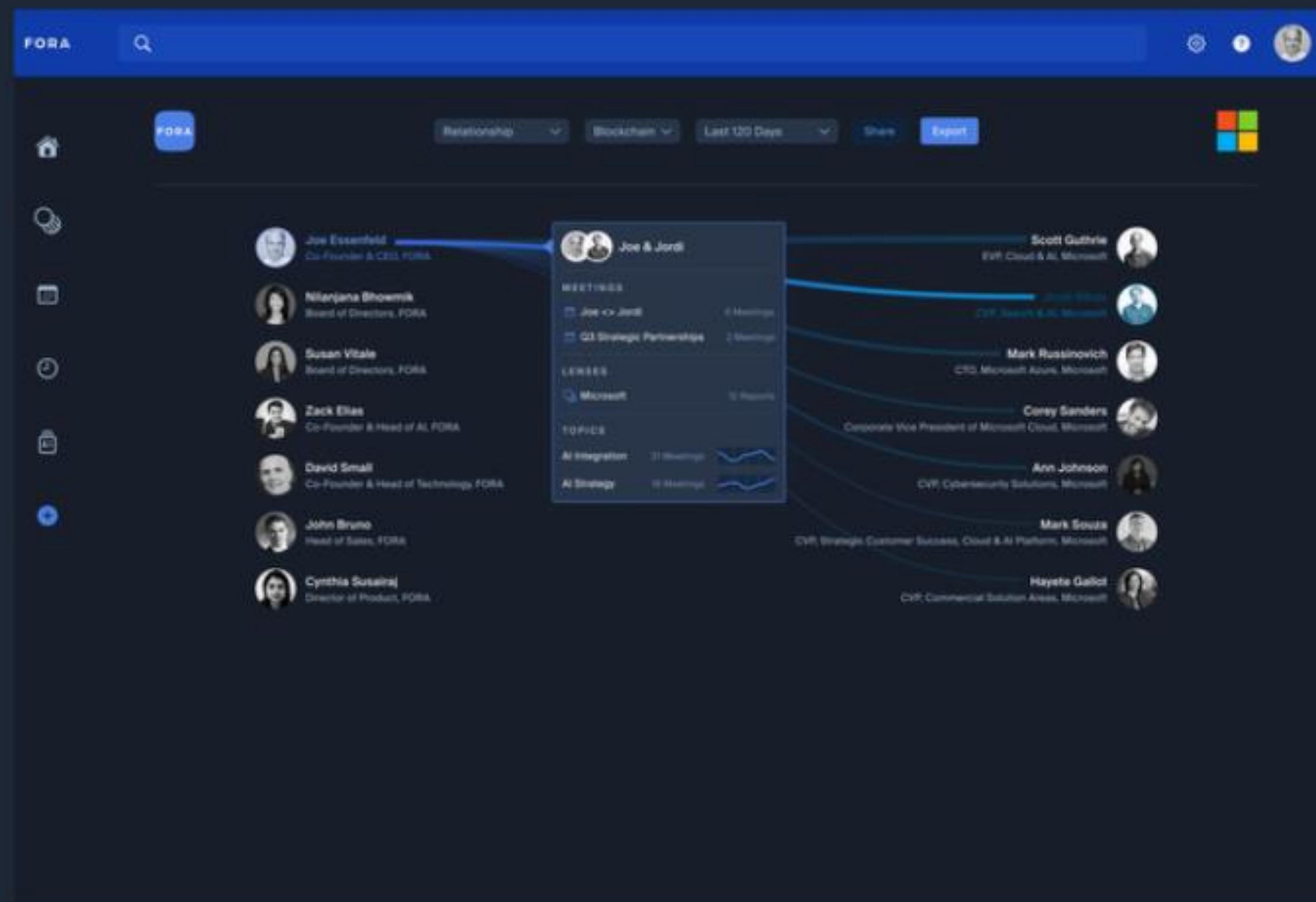
Sources

-  Innovation brainstorm 37m ago
-  Customers value quick insights; accuracy issues and marketing focus on cost-saving
-  Person/Companies pages 5d ago
-  Mobile interface improved, data accuracy and visualization need focus
-  Joseph Esserfeld and Sara Dema 5d ago
-  AI-driven vendor assessments boost SOC 2 readiness for September 1st compliance

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Insights for Leaders



Relationship Insights



Q3 Sales Contest – Azure Pipeline Challenge

Welcome to Q3 2024 sellers! We have an opportunity in the market to displace overpriced solutions and KNOW we can generate \$5M of pipeline in our customer and prospect segments. Leadership wants to offer some additional incentives to sweeten the pot even more. See below for details.

Created by Isabella Clark on Mon, Jul 15. Updated just now.

Azure Sales Team

Sales Team Update: Key Metrics and Strategic Initiatives

TODAY 2:18 PM The Azure sales team is making significant strides with its new AI solutions and performance metrics. The Azure sales team also delved into the latest Azure product features, with live demos and interactive Q&A sessions.

Azure Sales Performance Update

20m ago

Microsoft introduces AI-powered tools to enhance recruiting efficiency.

Sales Performance Metrics Review

10m ago

Q3 sales metrics highlight growth in pipeline value and quota achievement.

1 of 5

Contest Key Contacts



John Smith, Chief of Staff to COO
Maria Rodriguez, Director of Sales Enablement
Michael Brown, Sales Ops Manager
Alex Johnson, Product Manager
Isabella Clark, Sales Specialist

Microsoft Azure Pipeline Sales Contest Leaders

TOTAL VALUE
\$4,750,000

CONVERSION RATE
17.5%

TOP REPS BY PIPELINE VALUE



Microsoft Azure Sales Guide



- Identifies customer pain points and how to address them.
- Guides on calculating return on investment with examples.
- Highlights the unique benefits of Microsoft Azure over competitors.

Demo: Reducing Costs through Optimization



- Step-by-step process to use Azure to reduce costs.
- Demonstrating tools to monitor and control cloud spending.
- Tip for showcasing savings with long-term commitment options.

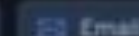
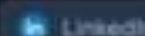
John Smith, Isabella Clark and 1 more (internal)

CREATED BY



Isabella Clark

Azure Sales Specialist, Microsoft



Sharing & Content Management

Simple Implementation & Setup

Safe & Private



SOC2 Certified





No BYO-Bot



Enterprise-First

fora.day