



ACME Corporation

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CLIENT VISIT REPORT

Discovery Call - Blue Harbor Insurance

VISIT DETAILS

Visit Date	2025/03/05	Visit Type	On-site
Status	Completed	Outcome	Positive
Location	Blue Harbor Tower, 1 Financial Center, Boston	Sales Rep	Sarah Johnson
Opportunity	520000.00	Currency	USD
Follow-up Date	2025/03/19		

CLIENT INFORMATION

Company	Blue Harbor Insurance
Contact	Natalie Brooks
Email	n.brooks@blueharbor.example
Phone	+1 (617) 555-0206
Industry	Insurance
Address	1 Financial Center, Boston, MA 02111

PURPOSE

Initial discovery meeting to understand Blue Harbor's insurance document automation needs. Focus on policy documents, claims letters, and renewal notices.

DISCUSSION NOTES

Blue Harbor processes 15,000+ policy documents monthly. Current system requires manual data entry into Word templates. They need SOC 2 Type II and HIPAA-adjacent compliance for insurance data. Discussed template versioning for regulatory changes. The VP of Operations was very receptive to the Lark Base workflow integration.

ACTION ITEMS

Action	Assigned To	Due Date	Priority	Status
Send compliance documentation package (SOC 2, HIPAA)	Sarah Johnson	2025/03/12	Critical	Completed
Create insurance-specific demo with policy document templates	Engineering Team	2025/03/21	High	Completed
Prepare ROI analysis based on 15,000 monthly documents	Sarah Johnson	2025/03/19	High	Completed

NEXT STEPS

1. Send compliance documentation package
2. Create insurance-specific demo environment
3. Prepare ROI analysis based on their volume

This visit report was prepared by the sales representative. Please review and distribute to relevant stakeholders within 48 hours of the visit.

Prepared by: Sarah Johnson