

BreezySuccess - Product Overview

Simplified customer success app for Salesforce-health scores, success plans, renewal risk tracking, and CSM notes on Account records.

What it does

- Account health scores (Green / Yellow / Red) on standard Account records
- Configurable health rules for NPS, renewal proximity, and last touch
- Success plans with milestones and onboarding checklists
- CSM notes (check-ins, calls, QBRs) with automatic last-touch tracking
- Customer health dashboard for managers and CSMs

Customer Health Dashboard

Customer Health Dashboard

Account Hub

Health Rules

Refresh

Account	Health	Score	NPS	Renewal	Last Touch	Active Pl...
Initech LLC	Red	40	3	Jul 17, 2026	Apr 28, 2026	0
Wayne Enterprises	Red	40	5	Sep 10, 2026	May 23, 2026	0
Globex Industries	Yellow	55	6	Aug 11, 2026	Jun 13, 2026	0
Acme Corporation	Green	100	9	Dec 24, 2026	Jun 27, 2026	1
Stark Industries	Green	100	8	Oct 25, 2026	Jun 22, 2026	0

Health Rules configuration

Health Rules

Back

New Rule

Name	Type	Thresh...	Weight	Active	
NPS Promoter	NPS	7	20	✓	▼
Renewal Risk	Renewal	90	25	✓	▼
Stale Touch	Last_Touch	30	15	✓	▼

How teams use it

Account record pages (recommended for CSMs)

Add the BreezySuccess Account Hub component to Account record pages (the package includes a BreezySuccess Account page layout). When a CSM opens an Account, the hub loads automatically for that account-health score, NPS, renewal date, success plans, milestones, and CSM notes in one place. No search required.

BreezySuccess app home (portfolio view)

The Customer Health Dashboard is the BreezySuccess app home page. It lists accounts that have any BreezySuccess activity:

- A health score, NPS, or renewal date on the Account, or

- An active success plan

Accounts are sorted by health score (lowest first) so at-risk customers surface at the top.

From the dashboard you can:

1. Open Account Hub from a row action on any listed account
2. Click Account Hub in the header to search for any account (including accounts not yet on the dashboard)

Account Hub for Acme Corporation with plans and CSM notes

9 Dec 25, 2026 Save Metrics

Success Plans

New Plan Name Add Plan

Q2 Onboarding — Active (1/3 milestones)

Plan Id for Milestone Milestone Name

Add Milestone

CSM Notes

Note Type Check-in

Subject

Body

Save Note

QBR check-in — QBR — Chad Riley
Reviewed adoption metrics and renewal timeline. Customer is on track for expansion in Q3.

Permission sets

- BreezySuccess Admin - admins who configure health rules and plans
- BreezySuccess Manager - CS team leads
- BreezySuccess User - CSMs who manage accounts day to day

Your Salesforce admin assigns the appropriate set to each user.

Install summary

Deploy from the BreezyGTM GitHub repository. Assign BreezySuccess Admin, assign the BreezySuccess Account record page (or add Account Hub to your Account layouts), and open the

BreezySuccess Lightning app.

Trial and consulting

Companies can install BreezySuccess for a free 30-day trial. BreezyGTM also offers consulting on setup and customization.

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