



CUSTOMER DOCUMENTATION SAMPLE

Quarterly Technology Review

Leadership review of operating health support trends projects lifecycle decisions and next quarter work

Prepared for Harborlight Design Studio | Fictional demonstration environment

This fictional Q3 2026 review shows how customer documentation can support a focused leadership conversation. Metrics are illustrative and do not represent TTCO performance, a service-level commitment, or a real customer outcome.

Document Control

CLASSIFICATION	Public fictional sample	VERSION	1.0
DOCUMENT OWNER	Tyler's Tech Company	EVIDENCE DATE	September 5 2026
REVIEW CADENCE	Quarterly and after material change	SAMPLE STATUS	Public fictional example

How to read status labels Verified, Customer confirmed, Provider reported, Planned, Out of scope, and Not verified show how evidence would be classified in a live customer document. All facts and statuses in this public sample are fictional.

Executive Summary

The sample environment remained operational during the quarter. Routine support volume was stable, the wireless and access refresh closed with bounded validation, and one representative recovery test passed. Leadership decisions are needed for the core-switch lifecycle item, the vendor-access review cadence, and a Q4 incident-response tabletop.

Quarter at a Glance

Area	Illustrative Q3 result	Interpretation
Support requests	38 closed and 2 carried into Q4	Most volume involved employee access devices and printing
Employee events	3 joiners 1 role change and 1 departure	All covered identity steps closed; one vendor action carried forward
Projects	Wireless and access refresh completed	Closeout issued with three follow-up items
Backups	Daily jobs reviewed and one file restore tested	Two design laptops still need coverage confirmation
Security actions	2 completed and 5 open	Vendor access and backup coverage are the highest-priority open actions
Lifecycle	1 network item and 2 laptops in planning horizon	Budget decisions are needed before Q4 purchasing



Support Themes

Theme	Illustrative count	Documentation response
Identity and access	12	Refined standard role checklist and exception field
Endpoint and applications	11	Updated device notes and application ownership
Printing and office access	7	Added office lead troubleshooting sequence
Network and provider	5	Updated escalation path after the refresh
Other requests	5	Recorded recurring vendor and training needs

Operating Health Scorecard

Area	State	Evidence	Next review
Identity baseline	Verified	Named accounts multifactor coverage and privileged-role inventory	Monthly
Managed devices	Provider reported	25 active managed laptops; two backup checks open	October 2026
Microsoft 365 backup	Tested	Daily job review plus one representative file restore	December 2026
Network infrastructure	Verified	Project closeout and controller readback	Monthly
Vendor access	Planned	Initial register exists; recurring review not yet completed	October 2026
Lifecycle plan	Customer confirmed	Core switch and laptop horizon reviewed	Budget cycle

Project and Improvement Status

Workstream	Quarter result	Remaining work	Owner
Wireless and access refresh	Completed and handed off	Battery runtime test and core switch budget approval	TTCO and operations
Employee lifecycle	Joiner and offboarding records updated	Formalize role-change exception review	Operations
Backup readiness	Representative file restore passed	Confirm two design laptops and plan broader tabletop	TTCO
Security roadmap	Privileged access and baseline review completed	Vendor access awareness evidence and incident tabletop	Leadership and TTCO



Upcoming Lifecycle and Renewals

Timing	Item	Planning note
Q4 2026	Core switch refresh	Approve window and budget
Q1 2027	Internet contract	Confirm fit pricing and escalation
Q2 2027	Network battery	Plan before service-life boundary
2027 budget	Two design laptops	Align warranty and workload needs

Leadership Decisions

Decision	Recommendation	Needed by	Owner
Core switch budget	Approve Q4 window	October 15 2026	Operations
Vendor-access review	Approve quarterly owner review	October 31 2026	Leadership
Incident tabletop	Approve 90-minute exercise	November 15 2026	Leadership
Backup coverage	Confirm two-laptop enrollment	October 7 2026	Operations and TTCO

Next Quarter Action Register

Action	Owner	Target	Success evidence
Verify two-laptop backup coverage	TTCO	October	Readback and bounded restore
Complete first vendor-access review	Operations	October	Approved register with exceptions
Run leadership incident tabletop	Leadership and TTCO	November	Scenario record decisions and owners
Confirm 2027 laptop budget	Department lead	November	Approved replacement horizon
Review finance recovery with vendor	Finance	December	Documented recovery steps

Evidence limits. All counts, findings, dates, and outcomes are fictional. Support counts and provider-reported states do not prove customer acceptance, business impact, or service-level performance. This review records decisions and priorities but does not replace the executed agreement, project acceptance, or incident process.

Revision History

Version	Date	Change	Prepared by
1.0	September 2026	Public sample release	Tyler's Tech Company