

ACCOUNT BRIEF

Northlight Group

Read before

October 15, 2026, 10:00

Regional operations lead and the Harbor and Fairview site managers

RECORD NG-4021 Southeast region	SITES 6 4 of them have units	UNITS IN SERVICE 4 Meridian Bench only	COVERAGE Atlas Care All four units, no Plus	TRAILING 12 MO \$15,992 Equipment \$9,700, service \$4,272, calibration \$720, training \$1,300.	CONTRACT ENDS Mar 31, 2027 170 days out. No renewal conversation is booked.
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SECTION ONE

The relationship, in four lines

MAR 12
2024

First order, single site pilot

Two Meridian Bench units at Fairview, Atlas Care on both, bought as a pilot with a stated review at six months.

AUG 5
2024

Pilot closed, no expansion

Both units kept. Northlight declined to expand and asked for the calibration schedule in writing, the first time the schedule came up.

FEB 18
2025

Calibration missed at Fairview by nine days

A \$180 credit was issued and the account moved onto scheduled reminders. The Fairview site manager still raises it.

JUN 3
2026

Two units added, first training delivered

Harbor and Ridgeway, \$9,700, Atlas Care on both. Two training days delivered June 22 and 23. The Pro tier was discussed for Harbor and never quoted.

SECTION TWO

What they buy, and what they do not

Buys

- + **Meridian Bench.** Four units over two years.
- + **Atlas Care.** \$356 a month across the four.
- + **Calibration.** Four in the last twelve months, \$720.
- + **Training, occasionally.** Two days, June 2026, \$1,300.

Does not buy

- **Meridian Pro.** Discussed twice, never quoted.
- **Atlas Care Plus.** Never on this account.
- **Meridian Field Kit.** No fit stated in any call.
- **Consumables.** Bought elsewhere since 2024.

SECTION THREE

Three open items

Two support tickets on the Fairview unit

DUE OCT 20

8814 opened September 22 and 8829 opened September 30, 2026. Both are reading drift on the same unit, and neither is closed.

OWNER MORGAN REYES, OPERATIONS

Pro tier evaluation for Harbor and Ridgeway

DUE OCT 24

Raised on September 15, 2026 and again on September 17. No quote sent. This is the meeting where it becomes a proposal or is dropped.

OWNER JORDAN VALE, ACCOUNT MANAGER

First calibration on the two June units

DUE NOV 6

Both due before June 3, 2027, neither booked. The February 2025 miss is why this is on the brief rather than in a queue.

OWNER AVERY KELLEN, CUSTOMER SUCCESS

SECTION FOUR

Two risks

HIGH

Renewal has no date on it

The contract ends March 31, 2027 and nothing is booked. Four units and \$4,272 a year of service lapse that day. Every week without a booked conversation turns the renewal into a price negotiation instead of an expansion.

MEDIUM

The February 2025 miss is still being cited

Raised again by the Fairview site manager on September 24, 2026, nineteen months on, with two tickets open on that unit. A second failure there would very likely end the Pro conversation at the other two sites.

RECOMMENDED NEXT STEP, ONE ONLY

Close the two Fairview tickets before the meeting, then **ask for a 45 minute renewal and expansion session before October 31, 2026** and leave with a date in the calendar. Do not open Pro pricing today: open the renewal date, and let the Pro tier be the reason to meet again.

OWNER

Jordan Vale

DO IT BY

Oct 31, 2026