

Your best CS lead has seen this before. Now your whole team has too.

The people who run customer success make hundreds of judgment calls a week, and the same problems keep coming back. Cortex remembers every call they made and why, so their team and your AI agents can ask them anything, any time, without asking them.

CLAUDE · RENEWAL QUEUE

REP

Northwind wants a 20% discount to renew or they walk. Third integration delay this year. What would Meera do?



CLAUDE ASKED MEERA'S CORTEX

CORTEX

She would not discount. On accounts like this, a discount sets the renewal anchor and the delay is the real problem. She offers a two-week onboarding sprint with a solutions engineer and joins the first call herself.

3 similar renewals

Pricing rule, 2025

Her note on Acme

CLAUDE

Drafted the reply in her tone, booked the sprint, and added Meera to Thursday's call.

**Meera's Cortex**

HEAD OF CUSTOMER SUCCESS

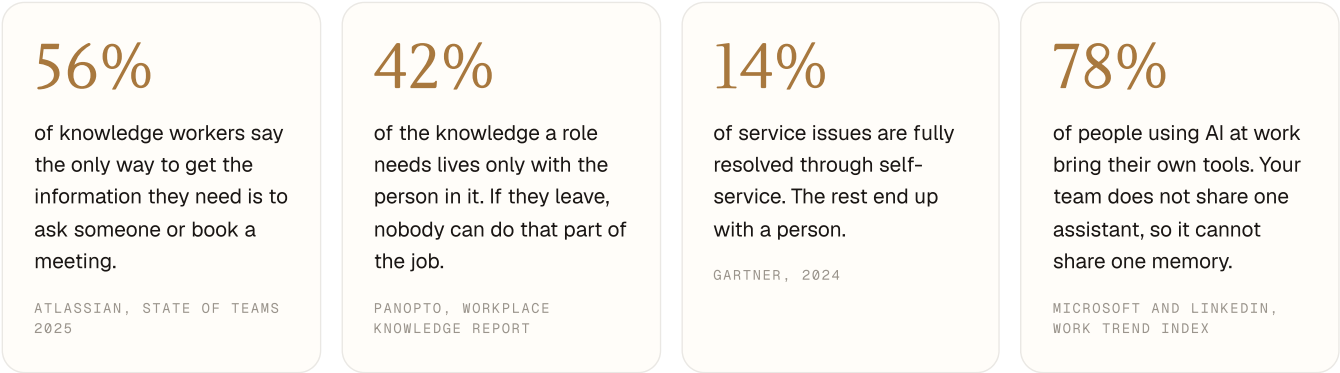
Confidence	High · matches 3 past cases
Decision	No discount. Onboarding sprint.
Hand back to Meera?	Only for the call
Time to answer	41 seconds

ILLUSTRATIVE EXAMPLE. NAMES AND ACCOUNTS ARE FICTIONAL.

THE PROBLEM

The answer exists. It is in one person’s head.

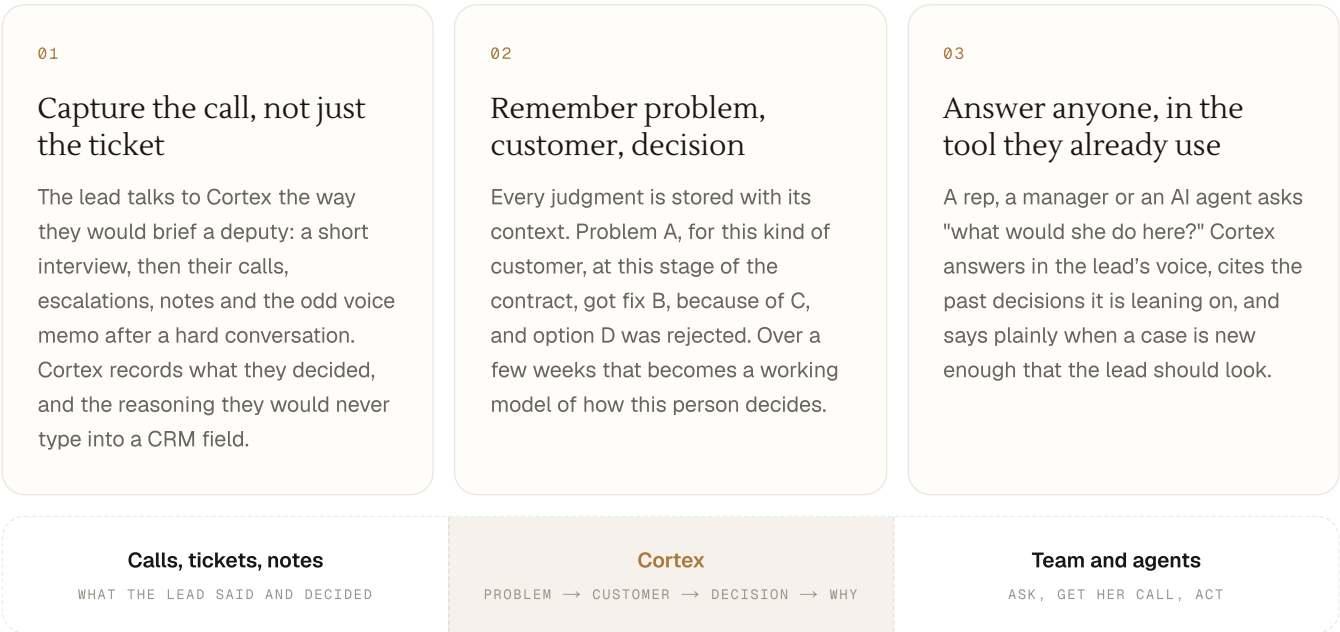
Every CS team has one person everyone pings. They know which customer gets a credit and which gets a call, which escalation is real, and what was promised two renewals ago. None of that is in the playbook, so the whole team queues behind them.



HOW IT WORKS

Decision by Cortex. Action by your tools.

Cortex does not replace your helpdesk, CRM or agents. It sits underneath them as the one place where your lead’s judgment lives, and answers whoever asks.



Not a transcript. A decision, with its reasons.

Search tools find the conversation. Cortex keeps what was decided, for whom, why, and what was ruled out. That is what lets it answer the next case, not just recall the last one.

DECISION RECORD · HEAD OF CUSTOMER SUCCESS		● USED IN 11 LATER ANSWERS
SITUATION	Enterprise account, 7 months into an annual plan, second failed integration go-live.	
CUSTOMER TYPE	High expansion potential, single champion, procurement-heavy.	
DECISION	Offer a free onboarding sprint with a solutions engineer. No discount.	
WHY	Discounts on this profile anchored renewals lower in 3 of the last 4 cases. Time-to-value is the real risk.	
REJECTED	Pro-rated credit. Escalating to the account executive before the sprint.	
OUTCOME	Renewed at list price. Expansion conversation opened in Q3.	

Four questions. One person used to answer all of them.

09:12 · NEW REP, WEEK TWO

“Customer wants to move billing to a different legal entity mid-contract. Can we?”

TODAY

Waits for the lead to come out of standup. Customer waits too.

WITH CORTEX

Gets the lead's rule and the two times it was bent, with the exact paperwork. Replies in four minutes.

11:40 · SUPPORT, TIER TWO

“Third outage complaint this quarter from a top-20 account. Escalate or handle?”

TODAY

Escalates by default. The lead's afternoon goes to triage.

WITH CORTEX

Cortex flags it as the lead's pattern for a save play, drafts the apology the way she writes them, and loops her in only for the call.

15:05 · CLAUDE, RUNNING THE RENEWAL QUEUE

“30 renewals due next month. Which ones are at risk, and what is the play?”

TODAY

A generic health score that treats every account the same.

WITH CORTEX

Claude asks the lead's Cortex account by account. The decision comes from her history; the follow-up tasks get created by Claude.

18:30 · THE LEAD IS ON LEAVE FOR TWO WEEKS

“Everything above, every day, while she is offline.”

TODAY

Decisions stall or get made inconsistently. She returns to a backlog.

WITH CORTEX

The team keeps deciding the way she would. She returns to a log of what her Cortex answered, and corrects anything she would have called differently.

Eight calls your lead makes every week.

Start with whichever one costs the most interruptions. The rest follow, because it is the same judgment underneath.

#01

Escalation triage

Which issues the lead personally takes, which go to engineering, and which are handled with a template and a follow-up call.

#02

Refunds, credits and goodwill

When a credit is right, when a refund is, how much, and what to say so the customer does not read it as an admission.

#03

Renewal risk and save plays

The signals the lead actually trusts, and the play she runs for each account shape. Not a health score, a judgment.

#04

Pricing and contract exceptions

What has been granted before, to whom, and what precedent it set. Sales stops asking the same question every quarter.

#05

Incident communication

Who hears first, how much detail goes out, and the tone the lead uses with a furious customer versus a worried one.

#06

QBR and exec reviews

What the lead would raise with this account, what she would not mention yet, and the story she would tell about the quarter.

#07

New rep ramp

A new hire asks the lead's Cortex instead of the lead. She stays the expert without being the help desk.

#08

Feature requests and roadmap asks

Which requests to escalate to product, which to decline, and how she says no without losing the account.

Operations runs on the same kind of judgment.

Anywhere one senior person signs off on the exceptions, the pattern is identical: the policy is written down, the judgment is not. A lot of operations work can be solved this way.

#01

Vendor and supplier risk review

How the risk lead weighs a missing SOC 2 report against a strong track record, which gaps block onboarding, and which get a remediation deadline.

#02

Payments and reconciliation exceptions

The mismatches that need a human, the ones that clear themselves, and who to call at the bank for the rest.

#03

Compliance and policy questions

How the compliance owner reads the policy in the grey areas the document does not cover, with the past rulings attached.

#04

Procurement and approvals

What the finance lead approves without a second look, what needs three quotes, and what always comes back with questions.

#05

Disputes and chargebacks

Which disputes are worth fighting, what evidence wins, and when to refund and move on.

#06

Logistics and fulfilment escalations

Reroute, refund or reship: the operations head's call for each failure, by customer and by margin.

WORKED EXAMPLE · SUPPLIER RISK

A supplier review that takes a team weeks is mostly the same twenty questions, answered the way one risk head would answer them.

An agent pulls the public filings and the supplier's questionnaire. It asks the risk head's Cortex how she weighs each gap: a missing SOC 2 report, a thin financial history, a sub-processor in a new jurisdiction. It scores the supplier the way she would and sends her only the cases that do not look like anything she has decided before. The routine work gets done; she reviews the hard part.

ONE SOURCE OF TRUTH

Switch assistants. Keep the judgment.

Half the team is on Claude, someone prefers ChatGPT, engineering lives in Codex and Cursor. If the lead's judgment lives inside one assistant's memory, it is gone the day you switch. Cortex connects to all of them over MCP and an API, so every tool reads the same answers.

Claude

ChatGPT

Codex

Cursor

MCP · API →

Your agents

Your API



Your lead's Cortex

DECISIONS · REASONS · VOICE

TRUST

Customer conversations are sensitive. We treat them that way.

Private by default

A Cortex answers only the people and agents its owner allows. Nothing is public unless someone chooses to make it so.

Your data is not training data

Conversations and decisions are used to answer your team, not to train models. Provider retention is switched off on every request.

Every answer shows its sources

Cortex cites the past decisions it leaned on, so a reviewer can check the reasoning instead of trusting a black box.

The owner stays in control

The lead can review what her Cortex said, correct it, and mark topics it should hand back to her.

ROLLOUT

Live in a month. Measured from week one.

WEEK 1

Interview the lead. Load a quarter of escalations, call notes and the decisions she remembers best.

WEEK 2

Three reps and one agent start asking. The lead reviews every answer and corrects the misses.

WEEK 4

The whole team and the renewal agent run on it. The lead reviews exceptions, not everything.

WHAT TO MEASURE

Interruptions to the lead

Slack pings and "quick questions" per week, before and after.

Time to a decision

From a rep asking to a customer hearing an answer.

Decision consistency

The same case, answered the same way, whoever picks it up.

Ramp time

Weeks until a new rep handles escalations without help.

QUESTIONS

What teams ask first.

Is this a chatbot for our customers?

No. It is for your team and your agents. Customers keep talking to people; those people just stop waiting on one person for every judgment call.

How is this different from a knowledge base?

A knowledge base tells you the rule. Cortex tells you how the person who owns the rule applies it, including the exceptions nobody wrote down.

What if Cortex gets a call wrong?

It says how confident it is, shows the cases it is drawing on, and routes genuinely new situations back to the lead. Her corrections become part of what it knows.

We use Claude today and might switch. Does that matter?

No. Cortex connects over MCP and an API, so any assistant your team adopts reads the same judgment. The memory belongs to you, not to the tool.

Do we need to clone the whole team?

No. Start with the one or two people everyone waits on. Everyone else asks them.

Stop being the help desk for your own team.

Start with one lead and one queue. In a month, the team decides the way they would, and they get their week back.

[MAKECORTEx.COM/USE-CASES/CUSTOMER-SUCCESS](https://makecortex.com/use-cases/customer-success)

SOURCES

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Scenarios on this page are illustrative composites, not a description of any one customer.