

MCP SERVER

NO CODE

CLOUD HOSTED

ClientSuccess MCP for AI Agents

Monitor Client Health Scores and SaaS Subscription Status

ClientSuccess lets your AI agent manage entire customer success operations through natural conversation. It gives you instant access to client health scores, subscription details, task lists, and interaction histories without ever needing to open the dashboard. You can monitor retention risks, audit contracts, and review ongoing success cycles directly inside your chat interface.

F Quality Score 3.6/100

customer-success

retention

health-scores

subscription-management

churn-prevention

b2b-saas



The connectivity layer between AI and the world's software.



Vinkius sits between AI and every application. All communication passes through Vinkius Cloud via the Model Context Protocol (MCP) — with governance, observability, and security at every layer.

Your AI Connections Run Through Vinkius Cloud

The world's largest
managed MCP catalog

Vinkius is the connectivity layer where AI connects to the software your business already runs. We handle the hosting, the security, the credentials, the uptime — you get agents that actually do things.

We operate the world's largest managed MCP catalog. Major SaaS platforms, CRMs, databases, and cloud providers — running, monitored, production-ready. This MCP server is hosted and maintained by the Vinkius Cloud for AI Agents.

The agent doesn't manage credentials, doesn't manage uptime, doesn't manage security. Vinkius does.

— Architecture principle

Four Pillars of the Vinkius Runtime

01 — Security by design

Credentials stay encrypted at rest via AES-256. The AI agent never touches raw keys — they're injected into a sandboxed V8 isolate at runtime. Actions are logged, and connections have an emergency kill switch.

03 — Deterministic observability

Eight immutable metrics per endpoint: request volume, p95 latency, error rate, active connections, cost attribution. A live payload feed logs every tool call with mutation detection.

02 — Built on MCP Fusion

This MCP server was built with **MCP Fusion**, the open-source framework (Apache 2.0) that powers the entire Vinkius catalog. Schema-as-firewall strips undeclared fields, compiled PII redaction runs at zero overhead, and cryptographic lockfiles produce git-diffable audit trails.

04 — Autonomous operations

Servers are deployed, monitored, and patched autonomously. New capabilities and security patches ship weekly. Zero-downtime deployments ensure continuous availability across all managed MCP servers.

AES-256

Encryption at rest

Ed25519

PKI vault signatures

24h TTL

Ephemeral session keys

V8 Isolate

Sandboxed execution

One Token. Instant Access.

Every MCP server on Vinkius is accessed through a **Connection Token**. Tokens are generated in the cloud dashboard and produce a unique MCP endpoint URL. Paste this URL into any MCP-compatible client — no SDK required.

A single token can serve **multiple AI clients simultaneously**, or you can issue separate tokens per client for granular access control. Each token tracks its own request count, last activity timestamp, and can be individually enabled or revoked.

MCP ENDPOINT

`https://edge.vinkius.com/{token}/mcp`

Claude



Cursor



VS Code



Windsurf



Grok



Gemini

Security Is the Architecture

Security in Vinkius is not a feature — it's the foundation of the runtime. The gateway enforces multiple independent protection layers between AI agents and third-party APIs.

01 — Ed25519 PKI Vault

Every workspace has an Ed25519 Master Key. Session keys are generated ephemerally (24h TTL) and signed by the Master Key. Credentials never leave the vault boundary.

02 — V8 Isolate Sandboxing

Tool code runs inside isolated-vm V8 isolates with 64 MB memory caps and per-request timeouts. No filesystem access, no network access except through the SSRF-guarded fetch bridge.

03 — SSRF Guard

All outbound HTTP requests are DNS-resolved and validated before execution. Private IP ranges (10.x, 172.16-31.x, 192.168.x, AWS metadata 169.254.x) are blocked at the network layer.

05 — Cryptographic Audit Trail

Every request is signed into a SHA-256 hash chain with Ed25519 signatures. Events form a tamper-proof, SIEM-exportable forensic record.

04 — DLP & PII Redaction

A ResponseGuard pipeline intercepts every tool response. Configurable redaction patterns strip sensitive fields (emails, SSNs, card numbers) before data reaches the AI agent.

06 — Honeypot Trap System

Phantom credentials are injected into isolated environments. If a honeypot is used outside Vinkius infrastructure, the server is quarantined instantly.

Emergency Kill Switch

EU AI Act Art. 14(1)
Compliant

The kill switch is an **emergency halt** mechanism — not a simple toggle. When triggered, it executes three actions atomically:

01 — Server deactivated

The MCP server is immediately taken offline across the entire cluster.

02 — All tokens revoked

Every connection token is invalidated. Total lockout — reconnection blocked until new tokens are issued.

03 — WebSocket connections killed

Active connections terminated via Redis pubsub broadcast. Propagates to every runtime node in the cluster.

Full Visibility. Zero Guesswork.

The Vinkius cloud dashboard includes a full MCP Governance suite — real-time analytics and security controls for production AI operations.

Control Plane

KPI dashboard with request volume, latency, success rate, token consumption, and AI-generated operational briefings.

FinOps

Cost tracking per tool, payload compression savings, budget optimization signals, and consumption trends.

Firewall & DLP

PII redaction activity, sensitive data protection counters, and security event timeline.

Agent Activity

Which AI clients are connecting, how often, and what they're doing — real-time session tracking.

Tool Health

Slowest and most error-prone tools, with actionable root-cause insights and performance baselines.

Incident Log

Error trends, failure rates, status-code breakdowns, and forensic audit trail access.

Get started at cloud.vinkius.com — connect your AI agent in under 60 seconds.

ClientSuccess MCP

8 tools available

Cloud-hosted on Vinkius

Running a customer success team means juggling dozens of dashboards just to keep track of one account's health.

ClientSuccess changes that. Connect this MCP to any AI client—like Claude or Cursor—and you gain full control over your entire customer lifecycle through simple conversation. Instead of clicking through tabs, you ask your agent about 'Acme Corp.'s' status, and it pulls together everything: their current contract details, the last time they had a major interaction, and if there are any pending tasks that need addressing.

This kind of deep visibility means your team spends less time gathering data and more time actually solving problems. You can ask to list all clients with low health scores or pull up every internal note related to a specific customer. Because this MCP connects directly to the ClientSuccess catalog, you get immediate access to comprehensive client metadata, giving you a single source of truth right where you're working. It's about making retention monitoring and account management feel native to your workflow.

Core Capabilities

01 — List all clients and their health scores

You can ask the MCP to pull a complete list of every client, immediately showing you their current status and risk score.

03 — Check subscriptions and contracts

The MCP monitors all active subscriptions and associated contracts for a specified client, noting renewal dates and plan names.

05 — Audit communication history and notes

Retrieve all internal notes, tasks, and contacts associated with a client's relationship record.

02 — Review specific client details

Get detailed background information on any given client with a single command.

04 — Track success milestones and tasks

You can list out any onboarding or success cycles currently in progress, plus check for pending to-dos assigned to the account.

One Click on Vinkius — From Prompt to Execution

Available at vinkius.com/mcp/clientsuccess — connect your AI agent in three steps.

- 01** First, subscribe to this MCP and provide your unique ClientSuccess API Key. You find that key in the platform's settings.
- 02** Next, connect it to your preferred AI client—whether that's Cursor or Claude. This registers the tool for use by your agent.
- 03** Finally, you simply talk to your agent using natural language. Your agent uses this MCP to perform actions and retrieve data from ClientSuccess.

The bottom line is, you never have to leave your chat window or open a separate dashboard again to manage client success data.

Built For

This MCP targets the Customer Success team. It's for the Ops Manager who gets tired of manually compiling reports from five different tabs, and it's for the CSM who needs instant context on a client call without leaving their screen.

Customer Success Manager

They use this MCP to monitor account health in real-time and pull up interaction history before talking to a high-value client.

Success Operations Specialist

They rely on the MCP to audit subscription data across multiple accounts and ensure all necessary follow-up tasks are recorded accurately.

Sales Team Lead

They use it to quickly look up a prospect's entire history, including past contacts and support notes, right from their chat interface during discovery calls.

What Changes When You Connect

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- 01** Instant risk assessment: Use the `list_success_clients` tool to pull a list of all accounts, instantly flagging those with low health scores so you know exactly where your focus needs to be.
-
- 02** Complete billing visibility: The MCP lets you access and monitor all subscriptions using `list_client_subscriptions`, eliminating manual checks across various financial systems.
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- 03** Single source of truth: Pull up everything about a client—notes, contacts, tasks—by chaining calls like `list_client_success_contacts` with `get_client_success_details`. No more jumping between tabs.
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- 04** Operational efficiency: By running `list_client_success_tasks`, your team knows exactly what needs to be done next for any client without having to open the main dashboard.
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- 05** Faster context switching: Instead of leaving your chat app, you get detailed profile information using `get_client_success_details` whenever you need it.
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Real-World Applications

Identifying at-risk accounts

The CSM needs to know which clients are slipping. They ask their agent, 'Show me all clients with a Risk health status.' The agent uses the MCP to run `'list_success_clients'` and returns an immediate list of three high-priority accounts needing attention.

Preparing for a QBR

The Sales Team Lead is meeting with a client. They ask, 'What's the full history and current contract status for Acme Corp?' The agent calls `'list_client_subscriptions'` and `'list_client_success_notes'`, providing both financial details and key conversation points in one summary.

Auditing post-sale handoffs

The Success Ops Specialist needs to confirm if the onboarding team completed all steps. They ask, 'What tasks are pending for Global Tech?' The agent uses ``list_client_success_tasks`` and instantly reports back on overdue items.

Onboarding status check

A manager needs to confirm if a client is moving through the correct success stages. They ask, 'What are the current cycles for Startup Inc?' The agent runs ``list_client_success_cycles`` and details where the client stands in their journey.

Patterns to Avoid

Jumping between tabs

X AVOID

The user has to open the ClientSuccess dashboard, click on a client's name, then navigate to 'Subscriptions', and finally copy key notes into an email. This takes 5-7 clicks.

✓ INSTEAD

Instead, ask your agent: 'What is Acme Corp.'s subscription status, and what were their last three internal notes?' The agent runs ``list_client_subscriptions`` and ``list_client_success_notes`` together, giving you the answer instantly in text.

Manual data aggregation

X AVOID

The Ops team spends an hour downloading CSV reports of client contacts and merging them into a master spreadsheet for leadership review.

✓ INSTEAD

Ask your agent to run ``list_client_success_contacts`` across the whole portfolio. The MCP pulls all necessary contact lists and structures the data for immediate consumption.

Searching by keyword only

X AVOID

The user searches the notes section for 'pricing' but misses related discussions about contract renewals that use different terminology.

✓ INSTEAD

Use natural language prompts like, 'Summarize all conversations regarding renewal terms for Global Tech.' The agent reviews ``list_client_success_notes`` and summarizes the whole context.

The Right Fit

Use this MCP if your team spends significant time gathering client data from multiple internal sources. You need a single, conversational entry point to view everything—from basic profile details using `get_client_success_details` to complex contract

audits via `list_client_subscriptions`. Don't use it if you only ever need to check one single piece of static information; those specialized dashboard views are fine. However, if your workflow involves cross-referencing client health scores with their pending tasks or contacts, this MCP is essential. It bridges the gap between knowing *what* happened (notes) and knowing *what needs to happen* (tasks/subscriptions).

ClientSuccess MCP for AI Agents: Managing Client Health Scores in SaaS CSM

Today, managing client health is a painful process. You open the platform and have to click through dozens of menus just to piece together one story. Did they complain about billing? Check notes. Is their contract ending soon? Go to subscriptions. Are they getting enough support? Check tasks. It's constant switching between tabs and dashboards, which means you lose time before you even start talking to the client.

With this MCP, that process disappears. You simply ask your agent: 'What is Acme Corp.'s health status, and are there any overdue items?' The AI handles the complex sequence of data pulls—from `list_client_success_details` to `list_client_success_tasks`—and gives you one clean, actionable summary. It turns a tedious audit into a single prompt.

ClientSuccess MCP for AI Agents: Auditing Subscriptions and Contacts

When your team needs to prepare for an executive review, the manual work is brutal. You have to pull a list of every client, then individually verify their contact records and current contract status just to ensure nothing was missed.

Now, you tell your agent: 'Give me a full overview of all clients and their contacts.' The MCP runs `list_success_clients` and `list_client_success_contacts`, giving you an immediate, structured report. This capability lets your team scale its oversight without increasing headcount.

ClientSuccess MCP: 8 Tools for Client Success Data Management

Use these tools to retrieve everything about your clients—details, contacts, notes, tasks, and contracts—all through simple prompts.

#	TOOL	DESCRIPTION
01	<code>get_client_success_details</code>	Pulls detailed information for one specific client record.
02	<code>get_my_success_profile</code>	Retrieves key identifying and role information about the user running the agent.
03	<code>list_success_clients</code>	Generates a list of all clients available within ClientSuccess.
04	<code>list_client_success_contacts</code>	Retrieves all contact names and associated information for a specific client's account.
05	<code>list_client_success_notes</code>	Fetches all internal notes, comments, or activity logs tied to one client.
06	<code>list_client_subscriptions</code>	Lists every contract and subscription record for a designated client account.
07	<code>list_client_success_cycles</code>	Provides visibility into all ongoing onboarding or success management cycles for a client.
08	<code>list_client_success_tasks</code>	Shows a list of pending tasks, to-dos, and action items assigned to the client.

See It in Action

Real prompts you can use once this MCP is connected to your AI agent through Vinkius Cloud.

U List all my clients with a 'Risk' health status.



Client Health Report: High Risk Accounts

We found 3 accounts requiring immediate attention:

- **Global Tech:** Status (Low) | Last Note: QBR scheduled next month. | Open Tasks: 2
- **Startup Inc:** Status (Critical) | Last Note: Support tickets open for 7 days. | Open Tasks: 5
- **Fast Logistics:** Status (Warning) | Last Note: Contract renewal pending approval.

Would you like to get the full contact list for any of these?

U Show me the subscriptions for 'Acme Corp'.



Subscription Details for Acme Corp

- **Plan:** Enterprise SaaS Plan
- **Cost:** \$12,000/year
- **Renewal Date:** Dec 31, 2026 (Auto-Renew)
- **Status:** Active

Please note the contract is set to auto-renew and requires no manual action for payment today.

U What are the pending tasks for the 'Global Tech' account?



Action Items for Global Tech

There are 3 items needing attention:

1. Quarterly Business Review (Due tomorrow)
2. Update Success Plan (Assigned to CSM John Doe)
3. Schedule Training Session (Owner: Operations Team)

Please tackle the QBR first; it's time-sensitive.

Frequently Asked Questions

01 How does ClientSuccess MCP improve my daily client management?

It lets you manage all your customer accounts from a single chat window. You stop jumping between dashboards and start asking questions like 'What is their current health score?' or 'Show me all pending tasks.' The answer comes back instantly, giving you the full picture.

02 Can I use ClientSuccess MCP to check contract details?

Yes. You can ask your agent for a client's subscriptions and contracts. It pulls up renewal dates, current plan names, and costs without you needing API access or manual lookups.

03 What kind of data does ClientSuccess MCP give me about accounts?

You get everything: the client's general profile details, every internal note written on their account, a list of all associated contacts, and any open tasks or cycles.

04 Is ClientSuccess MCP better than using spreadsheets for tracking clients?

Absolutely. While spreadsheets are fine for small lists, this MCP pulls live data directly from the source system. You get accurate health scores and real-time task updates that never become outdated.

05 How do I use ClientSuccess MCP to prepare for a client call?







Simply ask your agent to pull together all relevant information, like 'Give me the last 5 notes and their active subscriptions.' This gives you instant talking points about history and billing status.

Go Live in 60 Seconds

Get your connection token from cloud.vinkius.com, then paste the endpoint URL into any MCP-compatible client.

YOUR MCP ENDPOINT

```
https://edge.vinkius.com/[TOKEN]/mcp
```

CLIENT	WHERE TO CONFIGURE
 Claude AI	Profile → Customize → Connectors → "+" → Add custom connector → Paste endpoint
 Cursor	Settings → Features → MCP Servers → "+ Add New MCP Server" → Type: SSE → Paste endpoint
 VS Code	Ctrl/Cmd+Shift+P → "MCP: Add Server" → add <code>"clientsuccess": { "url": "..."</code>
 Windsurf	MCP Settings → <code>mcp_settings.json</code> → Add endpoint URL
 ChatGPT	Settings → Tools & plugins → Add MCP server → Paste endpoint
 Gemini	Extensions → Add MCP Server → Paste endpoint URL

ASK AN AI ABOUT THIS

Let your preferred AI explain this MCP server

-  **Ask ChatGPT** 
-  **Ask Claude** 
-  **Ask Perplexity** 
-  **Ask Gemini** 
-  **Ask Grok** 

READY TO CONNECT

ClientSuccess is live on Vinkius Cloud.

Get your connection token, paste it into your AI agent, and
start building. No SDK. No deployment. Just results.

[Start at cloud.vinkius.com](https://cloud.vinkius.com) →

vinkius.com · support@vinkius.com

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