

MASTER CLASS PRODUCT TRAINING WEBINAR

# The ClientSuccess Renewal Health Report



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client**success**

**For customer teams managing  
the commercial conversation  
or not—understanding and  
impacting the health of  
upcoming renewals is a team  
sport**

Today

# RENEWAL HEALTH REPORT VALUE PROPOSITION

1

## LEADERS

A clear forecast alongside current risk levels puts you in the operator's seat of your organization. Develop stability and avoid churn or contraction landmines. Quickly identify overdue renewals to recapture lost business and coach your team

2

## ADMINS

Sit thoughtfully in reality to operationalize the right processes to deliver on team objectives. Gain insight into what is working in your customer organization, and what needs to be reevaluated

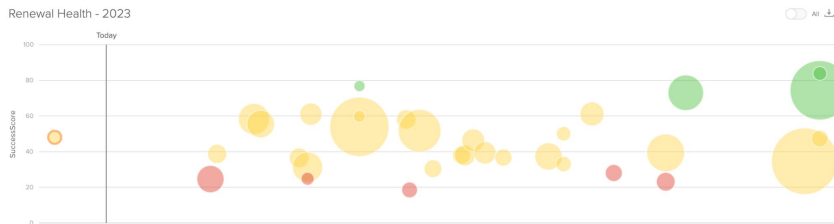
3

## END USERS

No more surprise churn. Identify risky accounts early to effectively mitigate losses and socialize product or service needs in advance of the renewal window. Reallocate your limited time to customers you can save

# DEVELOPING A CULTURE OF DAILY FORECASTING

- Effective planning requires three things: runway, data, and having the right people to delegate the work to
- Forecasting is forced planning. Any kind of impact made to the culture of forecasting is a start
- Consider holding space for a regular team meeting to sit with the forecast. What observations does your team come up with on your own?
- Developing business acumen comes from experience in the numbers—providing exposure to this data elevates the customer operation and shares accountability for business success



HEALTH			↑ ARR	RENEWAL DATE (DAYS) ↑
47.9	0	\$12,500	Sep 30, 2022 (-32)	
30.5	-100	\$29,375	Jan 1, 2023 (61)	
36.8	20	\$19,550	Jan 5, 2023 (65)	
54.2	0	\$34,049	Jan 27, 2023 (87)	

Renewal Date	Mar 31 2023
SuccessScore	53.6
Renewal Amount	\$68,000.00
CSM	Kristen Gray Psycha

# PLATFORM DEEP DIVE