

Churn Risk Indicators

INTERNAL — Helix Engineering / CS Operations

OVERVIEW

Identifying churn risk early lets us intervene while there's still time to save the account. Indicators are weighted; multiple together strongly predict churn.

STRONG INDICATORS

Primary champion has left the customer. Significant usage drop (>40% YoY, sustained 60+ days). Customer has explicitly mentioned a competitor. Renewal date is within 90 days and no QBR has been scheduled.

MEDIUM INDICATORS

Sustained ticket volume increase. Failed integration with a strategic third-party. Sentiment dropping in support interactions. Plan downgrade in the last 6 months.

WEAK BUT NOTABLE INDICATORS

Long gap since last login by primary users. Decreased engagement at QBRs. Champion changed roles internally. Internal restructure announced (M&A; layoffs).

WHAT TO DO WHEN INDICATORS APPEAR

(1) Document in the account record. (2) Reach out to the customer with a specific reason for the call (not 'just checking in'). (3) Schedule a discovery conversation to understand the underlying cause. (4) File a save plan if churn risk is moderate or higher.

WHEN TO ESCALATE

Multiple strong indicators. Customer >\$50K ARR. Strategic logo. Champion explicitly stated intent to evaluate alternatives. Loop in CS leadership and account team within 24 hours.

FALSE POSITIVES

Some indicators are seasonal or cyclical. Usage drops in December for many B2B customers. Don't pattern-match without context.