

Customer Health Score Methodology

INTERNAL — Helix Engineering / CS Operations

OVERVIEW

Health scores quantify customer health on a 0-100 scale. They are inputs to renewal forecasts and at-risk detection.

INPUTS

(1) Product usage (40%): runs per month, workflow count, integration count, active users. (2) Engagement (20%): champion responsiveness, attendance at QBRs, training participation. (3) Support (20%): ticket volume, severity, resolution satisfaction. (4) Commercial (20%): payment timeliness, expansion vs contraction signals, contract type.

USAGE COMPONENT

Calculated against the customer's plan size, not absolute. A Pro customer using 5,000 of 10,000 monthly runs scores higher than an Enterprise customer using 50,000 of unlimited because the relative engagement is higher.

ENGAGEMENT COMPONENT

Detected from CRM activity logs. Champion responding to emails within 48 hours, attending scheduled meetings, accepting calendar invites. Lack of engagement is a strong negative signal.

SUPPORT COMPONENT

High ticket volume can be a positive (engaged) or negative (frustrated) signal. We use sentiment analysis on ticket text to differentiate. Resolved-positive tickets boost score; unresolved-frustrated tickets reduce it.

SCORE BANDS

85-100: Healthy. 70-84: Stable. 60-69: Watch. 40-59: At risk. 0-39: Critical.

USAGE

CSMs should look at scores weekly. Significant changes (>10 points down in a week) trigger immediate review. Trends over multiple weeks matter more than single-week movements.