

Renewal Forecasting

INTERNAL — Helix Engineering / CS Operations

OVERVIEW

Renewal forecasts predict whether each customer will renew, downgrade, expand, or churn at their renewal date. Forecasts feed into corporate planning.

FORECAST CATEGORIES

(1) Commit — confirmed renewal, with paperwork in motion. (2) Best case — likely to renew but not yet confirmed. (3) Pipeline — probable to renew with normal handling. (4) At risk — material risk of churn. (5) Lost — confirmed non-renewal.

FORECAST CADENCE

Updated weekly by CSMs. Reviewed by CS leadership in Friday CS leadership meeting. Final monthly forecasts presented to executive team in board prep.

INPUTS

Health score. Recent customer interactions. Champion status. Usage trend. Outstanding issues. Pricing or contract negotiations in progress. Competitive evaluations the customer has mentioned.

FORECAST RIGOR

Avoid happy ears. If a customer says 'we'll probably renew', that is best case at most, not commit. Commit requires a written confirmation or paperwork in motion.

FORECASTING EXPANSION

Forecast separately from base renewal. An account renewing flat is different from one renewing with \$50K expansion. Both should be tracked.

QUARTERLY ACCURACY

CS leadership reviews forecast accuracy quarterly. CSMs whose forecasts are systematically optimistic or pessimistic get coaching.

WHAT NOT TO DO

Do not adjust forecasts purely to match a leadership target. The forecast must reflect actual reality. If reality and target diverge, the gap is the conversation, not the data.