

Plan Downgrade Workflow

INTERNAL — Helix CS Operations (scanned doc)

OVERVIEW

Downgrade requests are common after evaluation periods. The CSM's job is to understand the reason and offer alternatives that retain revenue.

REASONS CUSTOMERS DOWNGRADE

Cost concerns. Reduced usage. Team reduction. Switching to a competitor. Underused features. Confusion about plan differences.

INITIAL CONVERSATION

Acknowledge their request. Ask what changed. Most customers explain the reason without prompting if you give them space. Listen first; do not pitch.

RETENTION OFFERS (in order of preference)

(1) Annual billing at 20% discount. (2) Custom plan at a price between current and target plan. (3) Pause subscription for 1-3 months. (4) Reduced seats on the current plan if seat count is the cost driver.

WHEN TO LET THEM DOWNGRADE

If the customer's actual usage truly does not justify the higher plan. If they have already decided and engaging further damages the relationship. If they are explicit about wanting to self-serve the change.

PROCESSING THE DOWNGRADE

From the admin panel, schedule the plan change for the end of the current billing period. The customer keeps current features through end of period. Confirm via email with the effective date.

FOLLOWING UP

Schedule a check-in 30 days post-downgrade. Customers who downgraded often re-upgrade if the underlying reason resolves. CSM relationship maintenance keeps that path open.