

Renewal At Risk Playbook

INTERNAL — Helix Engineering / CS Operations

DEFINITION

A renewal is at risk when: (1) Customer has indicated they may not renew. (2) Health score has dropped below 60. (3) Primary champion has left the customer organization. (4) Major support incident in the last quarter. (5) Usage has dropped >40% year over year.

DETECTION

Health score is auto-calculated daily. CSMs receive a Slack alert when scores drop. Champion departures are detected via integration data; CSM gets notified within 24 hours of detection.

INITIAL ACTIONS

(1) Schedule a meeting with the customer ASAP — not 'in two weeks' but this week. (2) Review the account history: tickets, usage trends, recent changes. (3) Identify the actual decision-maker for the renewal.

DISCOVERY QUESTIONS

What's changed since you signed up? Are there features you wanted that we don't have? How is your team using Helix today vs at start? Who are the primary users? What would success look like in the next 6 months?

OFFER STRATEGY

Tailor offers to the actual concern: cost → multi-year discount; features → roadmap commitment; adoption → success engineer engagement; champion left → meet new stakeholders.

ESCALATION

Loop in CS leadership for accounts >\$50K ARR or strategic logos. Loop in product leadership for feature-driven concerns where roadmap commitments are needed.

DOCUMENTATION

Every at-risk account gets a save plan document: situation, risks, actions, owners, timeline. Update weekly until renewal closes.