

client success

REDUCE CHURN. INCREASE EXPANSION.
MAXIMIZE REVENUE.

[CSM NAME]

[TITLE]

INTERNAL QBR

DECEMBER 2022



BOOK OF BUSINESS

OF ACTIVE CUSTOMERS

AVERAGE ARR

NPS

SEVERE RISK

TOTAL MANAGED ARR

AVG. SUCCESS SCORE

RISK VS. SATISFIED CUSTOMERS

CUSTOMER MANAGEMENT

**CUSTOMERS WITH NO PULSE
UPDATED IN 30 DAYS**

**CUSTOMERS SUCCESS
SCORES BELOW 50**

**CUSTOMERS WITH
COMPLETED
SCORECARD (100%)**

**CUSTOMER
ADVOCATES**

**CUSTOMERS WITH NO
ENGAGEMENT IN 30 DAYS**

**CUSTOMERS WITH
COMPLETED SUCCESS AUDIT**

CUSTOMERS IN ONBOARDING

Q4 2022 RENEWAL PERFORMANCE

of Customers up for Renewal:

ARR up for Renewal:



Include chart

Q4 2022 EXPANSION PERFORMANCE

of Expansions Closed:

Expansion Revenue Closed:



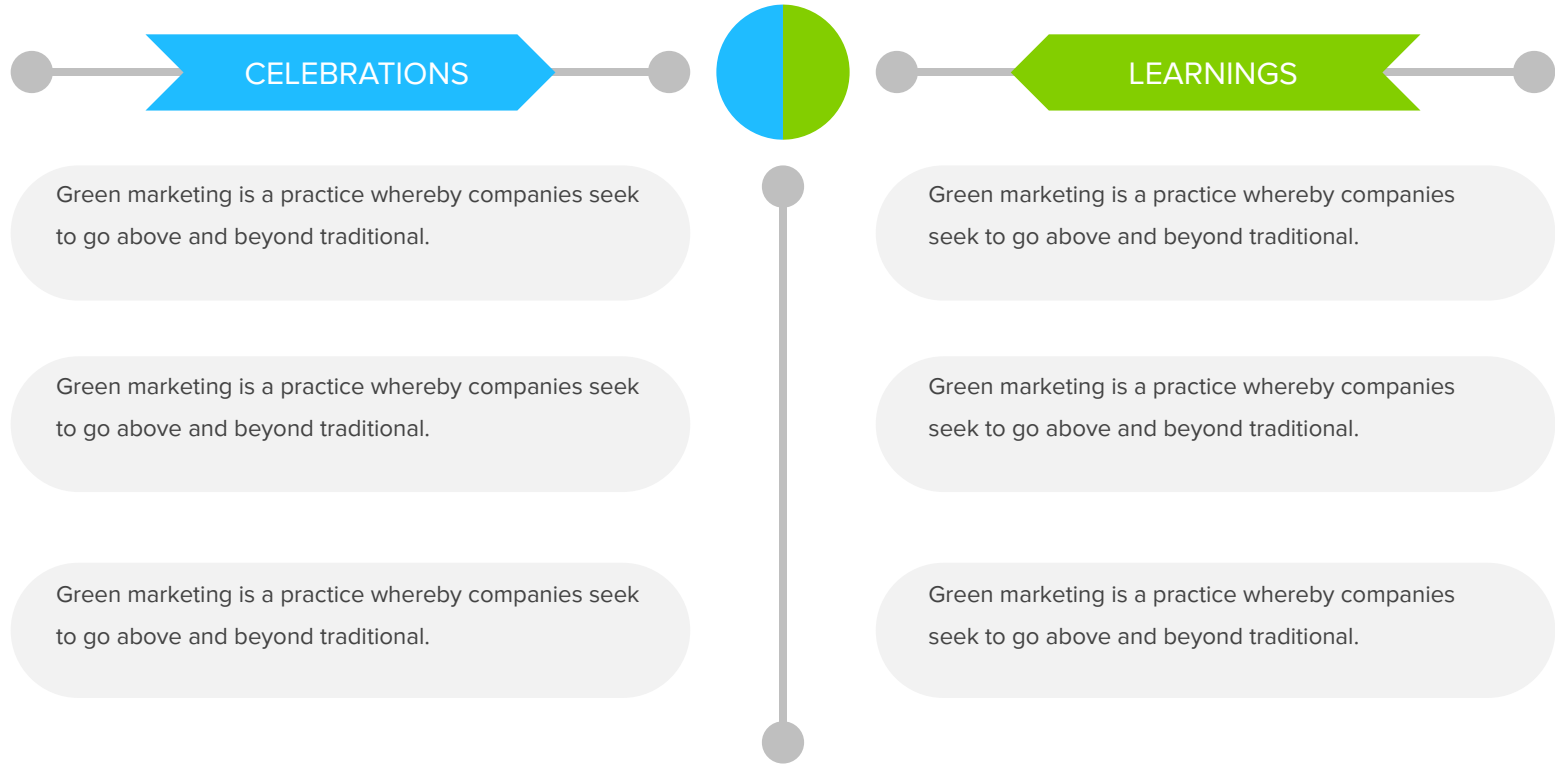
Include chart

Summary: [Include what attributed to the expansions/upsell closed. If any opps were closed lost, why did they slip? How were you able to influence the growth that was closed - 30 PI, demo, masterclass etc.]

Q4 2022 EXPANSIONS CLOSED

Client Name	EXPANSION DETAILS	ARR

Q4 2022 CELEBRATIONS AND LEARNINGS



LOOKING AHEAD: Q2 2022 PATH TO OPTIMAL RETENTION

- Here is an example of something I am going to do to ensure that we renew as much revenue as possible this quarter
- Here is an example of something I am going to do to ensure that we renew as much revenue as possible this quarter
- Here is an example of something I am going to do to ensure that we renew as much revenue as possible this quarter

CUSTOMER HEALTH

GET WELL PLAN FOR TOP 5 CUSTOMERS

CUSTOMER NAME	ARR	CURRENT PULSE	PLAN

GROWTH PLANS FOR TOP 5 CUSTOMERS

CUSTOMER NAME	ARR	CURRENT PULSE	PLAN

PROFESSIONAL DEVELOPMENT

1.

Here are the things I plan to do this quarter to grow professionally.

2.

Here are the things I plan to do this quarter to grow professionally.

3.

Here are the things I plan to do this quarter to grow professionally.

COMPANY RECOMMENDATIONS

1.

Here is an observation I've made around something we can improve as a team to show up better for our customers.

2.

Here is an observation I've made around something we can improve as a team to show up better for our customers.

3.

Here is an observation I've made around something we can improve as a team to show up better for our customers.

THANK YOU