

Customer Churn Prevention Playbook (Claude)

Based on analysis of 500 customers with 146 churn events

Executive Summary

This playbook addresses the **top 5 warning signs** that predict customer churn within 90 days, ranked by predictive power:

1. **Payment Delays** (578% higher risk)
2. **Support Ticket Volume** (270% higher risk)
3. **Support Resolution Time** (252% higher risk)
4. **Account Manager Disengagement** (82% lower engagement)
5. **Login Frequency Decline** (Moderate risk indicator)

Warning Sign #1: Payment Delays

Risk Level:  CRITICAL

Threshold: 23+ days payment delay

Intervention Timeline: Immediate (within 24 hours)

Early Detection Triggers

- **Yellow Alert:** 7-14 days late payment
- **Orange Alert:** 15-22 days late payment
- **Red Alert:** 23+ days late payment

Intervention Actions

Immediate Actions (Day 1)

- Account Manager reaches out within 4 business hours
- Finance team investigates payment processing issues
- Technical team checks for billing system problems

Day 3-5 Actions

- C-level outreach if payment still pending
- Offer payment plan or extended terms
- Review contract terms for flexibility

Day 7-14 Actions

- Executive escalation call
- Dedicated success manager assignment
- Consider contract renegotiation

Email Templates

Template 1A: Initial Payment Delay (7-14 days)

Subject: Quick check on your recent invoice - [Customer Name]

Hi [Contact Name],

I noticed your recent payment for [Amount] is a few days past due. This might just be an oversight, but I wanted to reach out to ensure everything is running smoothly on your end.

Is there anything I can help resolve regarding:

- Payment processing questions
- Invoice details or discrepancies
- Billing system access issues

I'm here to make this as easy as possible for you. Would you prefer a quick 10-minute call to sort this out?

Best regards,
[Account Manager Name]

Template 1B: Escalated Payment Delay (15+ days)

Subject: Let's resolve your payment concerns together - [Customer Name]

Hi [Contact Name],

I understand that payment delays can happen for various reasons, and I want to work with you to find a solution that works for your business.

Our options include:

- Extended payment terms (30/60/90 days)
- Installment payment plans
- Temporary service adjustments
- Contract modification discussions

Could we schedule a brief call this week? I'm committed to finding a path forward that supports your business needs.

Warm regards,
[Account Manager Name]

Warning Sign #2: High Support Ticket Volume

Risk Level: 🟡 HIGH

Threshold: 7+ tickets per month

Intervention Timeline: Within 48 hours

Early Detection Triggers

- **Yellow Alert:** 4-5 tickets per month
- **Orange Alert:** 6-7 tickets per month
- **Red Alert:** 8+ tickets per month

Intervention Actions

Immediate Actions (24-48 hours)

- Support manager reviews all recent tickets
- Identify patterns and root causes

- Assign dedicated support specialist

Week 1 Actions

- Schedule comprehensive health check call
- Provide additional training resources
- Consider on-site support visit

Week 2-4 Actions

- Weekly check-ins with support team
- Proactive monitoring implementation
- Success manager engagement

Email Templates

Template 2A: Support Volume Concern

Subject: Let's streamline your support experience - [Customer Name]

Hi [Contact Name],

I've been reviewing your recent support activity and want to ensure we're providing the best possible experience. I noticed you've submitted several tickets recently, and I'd love to understand how we can better support your team's success.

Would you be available for a 30-minute call to discuss:

- Any recurring challenges you're facing
- Additional training that might be helpful
- Ways to optimize your current setup

I believe we can significantly improve your experience with a few targeted adjustments.

Best regards,
[Support Manager Name]

Template 2B: Proactive Support Offer

Subject: Dedicated support resources for [Customer Name]

Hi [Contact Name],

Based on your recent support needs, I'd like to offer some enhanced support options to ensure your team gets the most value from our platform:

Available immediately:

- Dedicated support specialist assignment
- Priority ticket routing
- Weekly success check-ins
- Access to advanced training materials

Let's schedule a brief call to discuss which options would be most valuable for your team.

Looking forward to supporting your success,
[Customer Success Manager Name]

Warning Sign #3: Long Support Resolution Times

Risk Level: 🟡 HIGH

Threshold: 64+ hours average resolution time

Intervention Timeline: Within 24 hours of threshold breach

Early Detection Triggers

- **Yellow Alert:** 30-45 hours average resolution
- **Orange Alert:** 46-63 hours average resolution
- **Red Alert:** 64+ hours average resolution

Intervention Actions

Immediate Actions

- Support director reviews all open tickets
- Escalate unresolved tickets to senior engineers
- Implement priority support queue

Day 2-3 Actions

- Daily status updates to customer
- Senior engineer assignment
- Executive sponsor notification

Week 1+ Actions

- Post-resolution review call
- Process improvement implementation
- Service level agreement review

Email Templates

Template 3A: Resolution Time Apology

Subject: Improving our response time for [Customer Name]

Hi [Contact Name],

I want to personally apologize for the longer-than-expected resolution times on your recent support tickets. This doesn't meet our standards or your expectations.

Immediate improvements:

- Your tickets are now in our priority queue
- Senior engineer [Name] is personally handling your cases
- You'll receive daily updates until resolution

I'll be monitoring this closely and will follow up personally once we've resolved your current issues.

Sincerely,

[Support Director Name]

Template 3B: Process Improvement Follow-up

Subject: Your feedback helped us improve - Thank you

Hi [Contact Name],

Thanks to your patience during our recent support challenges, we've implemented several improvements:

- Enhanced escalation procedures
- Additional senior engineer coverage
- Improved ticket routing system
- Proactive monitoring for your account

Your experience is important to us, and these changes will benefit all our customers. Would you like to schedule a brief call to discuss any other ways we can improve?

Best regards,
[Customer Success Team]

Warning Sign #4: Low Account Manager Engagement

Risk Level: 🟡 MEDIUM-HIGH

Threshold: <2 interactions per month

Intervention Timeline: Within 72 hours

Early Detection Triggers

- **Yellow Alert:** 2-3 interactions per month
- **Orange Alert:** 1-2 interactions per month
- **Red Alert:** <1 interaction per month

Intervention Actions

Immediate Actions

- Account manager reaches out immediately
- Schedule regular touchpoint cadence
- Review account management strategy

Week 1 Actions

- Establish weekly/bi-weekly check-ins
- Provide value-driven content
- Assess customer success metrics

Month 1+ Actions

- Quarterly business reviews
- Strategic planning sessions
- Executive relationship building

Email Templates

Template 4A: Re-engagement Outreach

Subject: Let's reconnect - I'm here to support your success

Hi [Contact Name],

I realized it's been a while since we last connected, and I want to ensure you're getting maximum value from our partnership.

I'd love to schedule a brief catch-up to discuss:

- How things are going with the platform
- Any new challenges or opportunities
- Ways we can better support your goals

Are you available for a 20-minute call this week?

Looking forward to reconnecting,
[Account Manager Name]

Template 4B: Value-Focused Check-in

Subject: Quick wins and new opportunities for [Customer Name]

Hi [Contact Name],

I've been analyzing your account and identified several opportunities to enhance your results:

Potential improvements:

- [Specific feature] could reduce your workflow time by 30%
- New integration with [Tool] just launched
- Advanced reporting features for better insights

Would you like a brief demo of these new capabilities? I can show you exactly how they apply to your use case.

Best regards,
[Account Manager Name]

Warning Sign #5: Declining Login Activity

Risk Level:  MEDIUM

Threshold: 4+ days since last login

Intervention Timeline: Within 1 week

Early Detection Triggers

- **Yellow Alert:** 3-4 days since last login
- **Orange Alert:** 5-7 days since last login
- **Red Alert:** 8+ days since last login

Intervention Actions

Week 1 Actions

- Automated email sequence activation
- Account manager awareness notification
- Usage analytics review

Week 2 Actions

- Personal outreach from account manager
- Value demonstration content

- Re-engagement campaign

Week 3+ Actions

- Executive outreach
- Win-back campaign
- Retention offer consideration

Email Templates

Template 5A: Gentle Re-engagement

Subject: We miss you! Quick question about your [Platform] experience

Hi [Contact Name],

I noticed you haven't logged into [Platform] recently and wanted to check in. Sometimes a busy schedule can push these tools to the back burner - I completely understand!

Is there anything I can help with to make [Platform] more valuable for your daily workflow?

Quick options:

- 10-minute refresher call
- New feature walkthrough
- Workflow optimization tips

Just reply to this email, and I'll make it happen.

Best,
[Account Manager Name]

Template 5B: Value Reminder

Subject: [Specific Result] waiting for you in [Platform]

Hi [Contact Name],

I hope you're doing well! I was reviewing your account and noticed some great opportunities you might have missed:

Ready for you:

- [Number] unprocessed [items] that could save 2 hours this week
- New [feature] that automates your [process]
- Updated reports with insights on [specific metric]

Want me to walk you through these in a quick 15-minute session?

Looking forward to helping you succeed,
[Customer Success Manager Name]

Implementation Guidelines

Automation Setup

1. **Data Monitoring:** Set up automated alerts for all five warning sign thresholds
2. **Trigger Systems:** Create automated workflows to notify relevant team members

3. **Response Tracking:** Monitor intervention response rates and effectiveness
4. **Escalation Paths:** Define clear escalation procedures for each warning sign level

Team Responsibilities

Account Managers

- Primary response for Warning Signs #1, #4, #5
- Daily monitoring of assigned accounts
- Weekly reporting on at-risk customers

Support Team

- Primary response for Warning Signs #2, #3
- Immediate escalation procedures
- Resolution time monitoring

Customer Success Team

- Secondary support for all warning signs
- Strategic intervention planning
- Executive escalation coordination

Success Metrics

Response Metrics

- Time to initial outreach: <24 hours for critical alerts
- Response rates: >70% for email outreach
- Call connection rates: >50% for phone outreach

Outcome Metrics

- Churn prevention rate: Target 60% reduction
- Time to resolution improvement: >50% faster
- Customer satisfaction scores: Maintain >8.5/10

Leading Indicators

- Reduction in warning sign triggers
- Improved engagement metrics
- Increased product usage

Monthly Review Process

1. Analyze Warning Sign Performance

- Review trigger frequency
- Assess intervention effectiveness
- Identify pattern trends

2. Team Performance Review

- Response time analysis
- Success rate evaluation

- Training needs assessment
3. **Process Optimization**
 - Update thresholds based on data
 - Refine email templates
 - Improve automation rules

4. **Executive Reporting**
 - Summary of at-risk accounts
 - Intervention success stories
 - Recommendations for improvement
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Emergency Escalation Procedures

Critical Account Alert (Multiple Warning Signs)

When a customer triggers 3+ warning signs simultaneously:

1. **Immediate Actions (2 hours)**
 - Executive notification
 - Emergency response team assembly
 - Customer impact assessment
2. **24-Hour Actions**
 - C-level outreach
 - Dedicated success manager assignment
 - Comprehensive account review
3. **Week 1 Actions**
 - Daily executive check-ins
 - Accelerated issue resolution
 - Contract flexibility discussions

Executive Contact Scripts

C-Level Outreach Template

Subject: Personal attention for [Customer Name] - [Your CEO Name]

Dear [Customer CEO Name],

I wanted to reach out personally regarding your experience with [Company]. We've identified some areas where we can significantly improve our service to you.

I'd appreciate the opportunity for a brief conversation to understand your perspective and discuss how we can better support [Customer Company]'s success.

Would you be available for a 20-minute call this week?

Best regards,
[Your CEO Name]
CEO, [Your Company]

Last Updated: [Current Date]

Next Review: [30 days from current date]