

Playbook: Renewal

FOR YOUR
High-Touch

This is an example of a renewal play for High-Touch Customers. This is a Play fueled by value-add, goal-focused discussions with some automation to support.

1



Preliminary Research

Step: Task

Do preliminary research before reaching to the customer. Check their usage in your solution, reference their ChurnScore to see where there are gaps in value, and identify where they've met their goals throughout the year.

2



Call the Customer

Step: Email

Your customer likely has a relationship where they're used to being on the phone with you. Call the customer and explain that you'd like to discuss their achievements this year and what you need to do in the coming year to continue making sure they look like rock stars and meet their goals as individual professionals and as an organization.

3



Set Expectations

Step: Email

You've already introduced what you'd like to discuss on the call you've scheduled in the step above. Reset these expectations in a follow up email as well as the meeting invite. Highlight key areas of their success and how they reached their goals only at a high-level. Leave some hard-hitting information for meeting with the customer.

4



Conduct the Value Call

Step: Task

Your customer is coming to this meeting expecting you to lead them through what they've done this year. Be prepared with visuals (even if just the email above) then lead them into what they wish to accomplish the coming year. This will help them think about how they'll be using your software in the coming year. Ensure all key players (DMs, Exec. Sponsors, etc. are on this call.

5



Acknowledge the Renewal

Step: Email

Send an email explaining what they can look forward to in the upcoming renewal period as your Partner. Acknowledge that their renewal is coming up if you haven't already discussed in the above step. Detail how you'll be helping them meet their goals as discussed and how you'll get them there. Set a meeting to discuss the renewal specifically

6



Renewal Discussion

Step: In-App

Discuss the renewal and what all it will entail. Ensure all key players (DMs, Exec. Sponsors, etc. are on this call. Get any objections out of the way now and ensure that nothing has changed from their initial buying process.

7



Send a Thank You

Step: Email

This step is underutilized . A quick "Thank You" can go miles for a customer. Send this by hand if/when you can. Ensure that you enforce they've been a good decision and that they will be equally, if not more, successful in the coming year.

Final Thoughts

- Don't hesitate to acknowledge that the renewal is coming up.
- Provide them with what they've achieved before discussing renewal.
- **Get on the phone** and have a real conversation with your customer.
- Get everyone that will be involved in the decision on the value and renewal call.
- Reiterate the good decision they've made this year and in the upcoming year.