

Playbook: Renewal

FOR YOUR Low-Touch

This is an example of a renewal play for Low-Touch Customers. Automated touch points here will help the team present the value before securing the renewal.

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



Present the Value

Step: Email

This step is critical. You have done your research and it is now time to educate your customer on what they've done this year. Use your Attributes and Merge fields here to design a template that highlights big gains, wins throughout the year, and major milestones they reached during their current contract.

3



Call the Customer

Step: Task

Just because this customer is low-touch doesn't mean they wouldn't like to review their Account with you. Consider adding a touch point where you give the customer a call and discuss the metrics in the email above.

4



Reiterate Value

Step: In-app

Deliver to the customer a few key metrics that they should be aware of and milestones that they have reached during your relationship so far. Especially if you can use your merge fields to present things like Cost per Lead or mitigated costs on their end.

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 anniversary is coming up with your organization and reference your previous email, in-app, and call as to the value you've brought them. If we've kept in line with their initial goals - this should be the last email they need.

6



Friendly Reminder In-App

Step: In-App

Send along a quick reminder to the customer of what they should expect in the coming year. It's OK to reference coming releases, benefits for tenured customers, and other items you feel would add value to the customer's Partnership with you.

7



Send a Thank You

Step: Email

This step is so underrated and underutilized. A quick "Thank You" can go miles for a customer - especially if they know they don't have the visibility and interaction of a Mid-Touch or High-Touch customer. 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.
- Add a personal touch - low-touch customers love this.
- Use automation and attributes to deliver key pieces of info at scale.
- Reiterate the good decision they've made this year and in the upcoming year.