Playbook: Renewal

FOR YOUR
Low-Touch
Preliminary Research

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, identify value they've missed achieving throughout the year.

1. 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. Reiterate Value

Step: In-app

Deliver to the customer a few key metrics that they should be aware of and reference the achievements that they've realized during their 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 and how you plan to be their Partner. Acknowledge that their anniversary is coming up with your organization and reinforce your previous email, in-app, and call as to the value you've brought them that 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 or 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 reinforce that you’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.
- Offer a personal touch - low-touch customers love this.
- Use automation and attributes to deliver key pieces of info at scale.
- Reinforce the good decisions they’ve made this year and in the upcoming year.

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