

Playbook: Renewal

FOR YOUR
Mid-Touch

This is an example of a renewal play for Mid-Touch Customers. Automated touch points here mixed with meaningful discussions surrounding value.

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. Ask for a meeting in this email.

3



Call the Customer

Step: Task

This is a mid-touch customer and they expect to hear from you. You must give them a call to discuss the above email where you define the value. This call your goal is to set a date in the future to discuss the email and achievements throughout the year as well as goals for the upcoming year.

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. Expansion opportunities present themselves here too.

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.

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. 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.
- 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.