

YOUR EXC | RETENTION ISN'T LUCK. IT'S A SYSTEM.

THIS TOOLKIT GIVES YOU THE CHURN SIGNALS, RESPONSE PLAYS, AND FIX PATH.

WHAT'S INSIDE THE TOOLKIT?

Customer Churn Risk Signals Checklist

Identify early warning signs before customers leave.

Customer Health Score Tracker

Track engagement, satisfaction, and usage trends across accounts.

Retention Playbook & Outreach Planner

Step-by-step strategies to re-engage and retain at-risk customers.

Proactive Communication Script Pack

Email, call, and message templates for customer check-ins.

Churn Analysis & Exit Survey Template

Understand why customers leave and how to win them back.

Retention Campaign Calendar

Plan, track, and evaluate campaigns to boost long-term loyalty.

WHO IS THIS FOR?

- SaaS, subscription, and service-based businesses experiencing churn
- CX and Customer Success teams responsible for retention
- Founders and leaders looking to protect recurring revenue
- Agencies and consultants supporting client loyalty strategies

WHAT YOU'LL BE ABLE TO DO

- Spot churn risks early with clear data signals
- Deploy timely retention interventions
- Personalise re-engagement outreach
- Reduce voluntary and avoidable churn
- Build stronger, longer-lasting customer relationships

HOW TO USE EACH TEMPLATE

Customer Churn Risk Signals Checklist

Use this checklist to identify early warning signs that a customer may be at risk of churning. Regular monitoring of these indicators can help you take proactive steps to retain customers before it's too late.

Customer Health Score Tracker

Track key signals like usage, support issues, and survey scores to assign each customer a Health Score and churn risk level. Update regularly to guide retention actions.

Retention Playbook & Outreach Planner

This playbook helps you design proactive retention strategies and plan targeted outreach to reduce churn. Use it as a living document to guide your CX and Customer Success teams in saving at-risk accounts.

Proactive Communication Script Pack

Use these scripts to proactively engage customers and reduce churn. Tailor them based on customer segment, risk level, and communication channel.

Churn Analysis & Exit Survey Template

Use this template to systematically capture feedback from customers who churn or cancel their service. This helps uncover patterns, address key issues, and improve future retention strategies.

Retention Campaign Calendar

Plan, track, and manage your retention campaigns by logging key details like dates, target segments, channels, messages, and outcomes. Review regularly to stay proactive.

CUSTOMER CHURN RISK SIGNALS CHECKLIST

ENGAGEMENT & USAGE DROP-OFF

- Decline in product logins or usage frequency
- Incomplete onboarding or low product adoption
- Feature usage declining or stagnant
- Deactivation of users or removal of integrations

SUPPORT & SENTIMENT SIGNALS

- Increase in support tickets or complaints
- Negative sentiment in customer interactions
- Unresolved issues or long resolution times
- Customer expressing dissatisfaction or frustration

FEEDBACK & SURVEY INDICATORS

- Low or declining CSAT (Customer Satisfaction) scores
- NPS detractor or passive score
- Feedback indicating unmet expectations or lack of ROI
- Survey non-responsiveness or disengagement

COMMERCIAL & RELATIONSHIP RISK

- Missed payments or late renewals
- Reduced contract value or usage tier downgrade
- Loss of key decision-maker or internal champion
- Lack of engagement from customer stakeholders

LIFECYCLE & BEHAVIOURAL TRIGGERS

- No activity within first 7/14/30 days of onboarding
- No logins for X days (based on average usage cycle)
- No recent response to emails, calls, or offers
- Declining attendance at meetings, demos, or events

ACTION PLAN

Use this checklist during regular account reviews or churn prevention meetings.

Track risk signals in your CRM or health scoring tool.

CUSTOMER HEALTH SCORE TRACKER

CUSTOMER NAME					
CUSTOMER SEGMENT					
ONBOARDING COMPLETED (Y/N)					
PRODUCT USAGE FREQUENCY (HIGH/MED/LOW)					
FEATURE ADOPTION SCORE (1-10)					
SUPPORT TICKETS (30 DAYS)					
CSAT SCORE					
NPS SCORE					
LAST LOGIN DATE					
ACCOUNT OWNER ACTIVITY SCORE (1-5)					
PAYMENT STATUS					
HEALTH SCORE (1-100)					
CHURN RISK LEVEL (LOW/MED/HIGH)					
RETENTION ACTION PLAN					
NEXT REVIEW DATE					

RETENTION PLAYBOOK & OUTREACH PLANNER

STEP 1: IDENTIFY AT-RISK CUSTOMERS

- Use your Health Score Tracker to segment customers into risk tiers (Low, Medium, High)
- Prioritise outreach for customers with recent decline in usage, poor survey scores, or missed payments

STEP 2: CHOOSE A RETENTION STRATEGY

SELECT THE MOST RELEVANT INTERVENTION BASED ON CUSTOMER BEHAVIOUR:

- Re-Engagement Campaign (email sequence + check-in call)
- Success Review Session (strategic call with CSM/Account Manager)
- Product Coaching (quick sessions or tutorials)
- Loyalty Offer (discount, upgrade, or incentive)
- Problem Resolution (directly address unresolved complaints)

STEP 3: OUTREACH PLANNER TEMPLATE

USE THIS TABLE TO SCHEDULE AND TRACK RETENTION COMMUNICATIONS.

CUSTOMER	RISK LEVEL	CHOSEN STRATEGY	OWNER	CONTACT DATE	CHANNEL	OUTCOME	NEXT STEP

RETENTION PLAYBOOK & OUTREACH PLANNER

STEP 4: CREATE OUTREACH SEQUENCES

PLAN YOUR MESSAGES ACROSS EMAIL, PHONE, AND IN-APP MESSAGING:

Email 1: Reconnect

- Subject: "Can we help?"
- Body: Reference their account, offer to review value together, link to book a call.

Follow-Up Call: Discovery & Needs Assessment

- Goal: Understand if needs have changed or pain points haven't been addressed.

Email 2: Tailored Offer

- Subject: "Let's make it right"
- Body: Propose loyalty or renewal offer, training, or additional support.

Final Email: Last Touchpoint

- Subject: "Still hoping to reconnect"
- Body: Reiterate your commitment to their success and offer future re-engagement.

STEP 5: TRACK & OPTIMISE

- Review outreach performance weekly
- Document lessons learned for future retention playbooks
- Optimise message timing, format, and owner accountability
- Use CRM or health tracker tools to integrate actions across teams

PROACTIVE COMMUNICATION SCRIPT PACK

EMAIL SCRIPT – LOW ENGAGEMENT CHECK-IN

Subject: Just Checking In – How Can We Help?

Hi [First Name],

We noticed it's been a little while since you last used [Product/Service]. I wanted to check in and see if there's anything we can do to support you.

If you'd like to explore how to get more value from [Product], I'd be happy to walk you through some tips or resources.

Let me know what works best for you.

Best,
[Your Name]

CALL SCRIPT – AT-RISK CUSTOMER

"Hi [Name], it's [Your Name] from [Company]. I wanted to quickly check in because I saw a few signs that you may not be getting the full value from [Product/Service].

Would it be helpful if we set up a quick call to review your goals and see how we can support your success?

We really value your business and want to make sure everything is on track."

CHAT SCRIPT – INACTIVE USER

"Hey [First Name], just checking in! Noticed you haven't logged in recently—can I help with anything? I'd love to make sure you're getting the most out of [Product]."

PROACTIVE COMMUNICATION SCRIPT PACK

EMAIL SCRIPT – RENEWAL RISK

Subject: Let's Talk About Your Renewal

Hi [First Name],

With your renewal coming up, I wanted to connect and make sure you're getting the most from your experience with us.

If there are any blockers or opportunities we can help with, I'd love to discuss them and find a solution that works for you.

Looking forward to hearing your thoughts.

Best,
[Your Name]

FINAL OUTREACH – NO RESPONSE

Subject: Still Here to Help

Hi [First Name],

I've reached out a couple of times and just wanted to say—no pressure at all, but we're still here if you need anything.

Feel free to reach out when the time is right, and thank you for being a valued customer.

Warm regards,
[Your Name]

CHURN ANALYSIS & EXIT SURVEY TEMPLATE

EXIT SURVEY TEMPLATE

Dear [Customer Name],

We're sorry to see you go and would appreciate a few minutes of your time to help us understand your experience.

1. WHAT WAS THE PRIMARY REASON FOR CANCELLING?

Price

Product didn't meet needs

Switched to competitor

Poor customer support

Technical issues

Lack of usage

Other: _____

2. WHAT COULD WE HAVE DONE TO KEEP YOU AS A CUSTOMER?

[Open Text Field]

CHURN ANALYSIS & EXIT SURVEY TEMPLATE

EXIT SURVEY TEMPLATE

3. HOW SATISFIED WERE YOU WITH OUR PRODUCT/SERVICE OVERALL?

Very Satisfied

Satisfied

Neutral

Dissatisfied

Very Dissatisfied

4. WOULD YOU CONSIDER RETURNING IN THE FUTURE?

Yes

No

Maybe

5. ANY OTHER FEEDBACK OR SUGGESTIONS?

[Open Text Field]

CHURN ANALYSIS & EXIT SURVEY TEMPLATE

INTERNAL CHURN ANALYSIS TEMPLATE

CUSTOMER NAME

SEGMENT/INDUSTRY

CHURN DATE

CSM/ACCOUNT OWNER

CHURN REASON (FROM EXIT SURVEY)

HEALTH SCORE AT TIME OF CHURN

SUPPORT HISTORY

ENGAGEMENT TRENDS (LAST 90 DAYS)

RETENTION ATTEMPT MADE? Y/N

RETENTION OFFER GIVEN

NEXT STEPS / LESSONS LEARNED

RETENTION CAMPAIGN CALENDAR

CAMPAIGN NAME				
START DATE				
END DATE				
TARGET SEGMENT				
OWNER				
CHANNEL(S)				
KEY MESSAGE				
TACTIC TYPE (EMAIL, CALL, PROMO)				
EXPECTED OUTCOME				
STATUS				
PERFORMANCE NOTES				

YOURCXC |

**FIX THE EXPERIENCE.
GROW THE REVENUE.**

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