PORTFOLIO
CASE STUDY

Customer Retention

How I built clearer risk management, lifecycle outreach and expansion practices

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Sales, Customer Success
and Business Operations

Case study from a previous leadership role. No confidential customer data is included.

Scope of the role

Customer Success operated alongside Consumer Sales, B2B Inside Sales and Sales Development

What needed attention

Build clearer Customer Success practices around onboarding, customer risk, retention and expansion while improving visibility across teams.

- Defined risk reviews and escalation ownership
- Introduced lifecycle outreach and follow-up
- Built scorecards, playbooks and coaching routines
- Improved handoffs with Sales, Product and Support

Results

The team improved retention while creating a clearer path to customer expansion

38%

Approximate reduction in churn

60%

Customers identified as likely to churn who were saved in Q2 2024

18%

Customer upgrade rate

Results reflect leadership work completed within the company and do not represent a separate consulting engagement.

How the risk process worked

The team used conversation signals, assigned an owner and tracked the outcome

1

Detect

Review support conversations, usage concerns and onboarding gaps

2

Assess

Confirm risk level, customer impact and responsible owner

3

Act

Contact the customer with a specific recovery or adoption plan

4

Review

Track outcome, recurring cause and expansion opportunity

Work completed

The role covered both Customer Success operations and frontline management

- Customer journey and onboarding design
- Churn analysis and risk segmentation
- Lifecycle communication and escalation management
- Upsell and cross-sell program development
- Scorecards, coaching and cross-functional operating reviews

Technology used

Zendesk

Gainsight

HubSpot

AI-assisted conversation review