A Customer Health Score is a **metric based** scoring mechanism used to **predict** customer **behaviors**.

THE DATA

01

ACCESS

Make sure you have access to all of the data you will need to formulate your Health Score.

02

ACCURACY

Verify that the data is accurate. May times the data coming from compromised sources can be wrong.
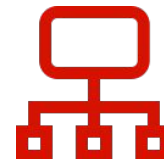
03

CURRENT

Ensure the data is current and understand the cadence in which it is refreshed, this will impact how it should be used for scoring.

04

IMPACTFUL

Is it the right data? Make sure that any data you use is data that will actually tell you something meaningful and actionable about your customers.
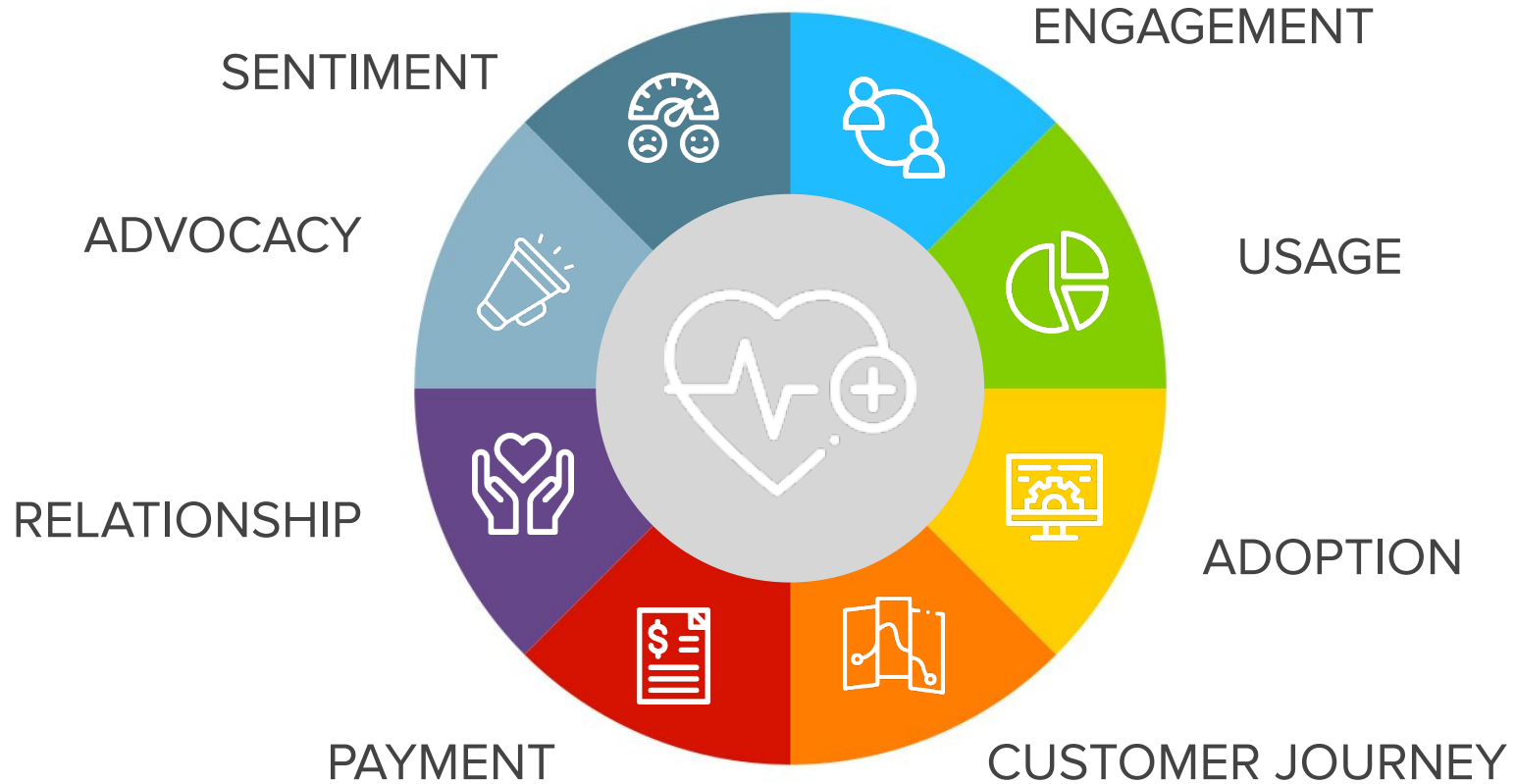
05

INTEGRATED

The data must all work together to formulate a Health Score. If you are using a Customer Success Platform, like ClientSuccess, you can structure it there.

THE METRICS

THE METRICS DEEP DIVE

ENGAGEMENT

What type of engagement?
Days since last engagement?
Engagement with whom?
Method of engagement?

USAGE

Is everyone using the platform?
How often are they using the platform?
Are there licenses unused?
Are they using it as intended?

ADOPTION

Are they using the solution inline with their use cases?
Have they used all of the features or functionality they have purchased?

JOURNEY

What stage are they in the Customer Journey? What milestones have they completed? How long have they been a customer?

PAYMENT

Have they paid their most current invoice?
Is there an outstanding balance?

RELATIONSHIP

"Regular" engagement with main POC?
Relationships established at multiple levels?
Multithreaded relationships across your organization?
Trusted Advisor status?

SENTIMENT

How do they feel about the partnership?
How do they feel about the product?
What are the recent survey scores?
What have they said in reviews?

ADVOCACY

Are they willing to serve as a positive reference?
Have they opted into customer marketing initiatives?
Will they refer customers to you?
Will they leave a review?

THE WEIGHTING

ENGAGEMENT	USAGE	ADOPTION	JOURNEY
15%	15%	15%	10%

PAYMENT	RELATIONSHIP	SENTIMENT	ADVOCACY
5%	15%	15%	10%

THE PLAN

01

IDENTIFY

Identify customers whose behaviors indicate some need to provide strategic support.

02

IDEATE

Based on the data from the Health Score you'll be able to leverage a playbook or devise a plan to mitigate risk or capitalize on opportunity.

03

INTERVENE

Time to take action! Based on the data and now the plan, you need to intervene in a timely manner in order to drive the right outcome.

THE IMPACT

INCREASED CUSTOMER VALUE

1

Indicators signal when customer usage/adoption decrease; early warning signs permit you to step in to assist. Early intervention with training and enablement can get people on track.

INCREASED CUSTOMER RETENTION

2

The ability to identify risk early in the partnership enables you to intervene before things escalate and allows time to get the partnership back on track. Increases in retention.

INCREASED ADVOCACY

3

Identifying customers who are using your technology effectively, are highly engaged and have a positive sentiment should be prime for advocacy opportunities.

INCREASED NRR

4

Customers with strong adoption and maximized consumption would qualify as optimal growth opportunities. This would support targeted efforts around upsell.

THANK YOU