CONCEPT

Customer Success Management: Health Scores, Renewals and Net Revenue Retention

28 June – 2 July 2027
Barcelona - Eixample district four-star



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Introduction:

Customer success management decides whether a subscription or B2B service business keeps and grows the revenue it has already won. Many teams still treat the post-sale phase as reactive support: onboarding drifts, product usage goes unmeasured, renewals are chased in the final month and account risk surfaces only when a cancellation notice arrives. This Core Concept course equips practitioners to run the customer success function with a clear operating model, measured adoption, health scores, success plans and disciplined renewal work. Participants build a Customer Success Playbook with a Weighted Health Score Model for a case company.

Course Objectives:

- Define a customer success operating model with coverage tiers, role boundaries and capacity ratios for a subscription or B2B service portfolio
- Plan onboarding programmes that shorten time-to-value and confirm the customer's first measurable outcome
- Analyse product adoption and usage data to identify accounts that are thriving, stalling or at risk
- Build a weighted customer health score and link each score band to a defined intervention
- Run success plans, executive business reviews, renewal forecasts and expansion motions alongside sales and support colleagues
- Measure gross and net revenue retention and report customer success performance to leadership

Target Audience:

- Managers who own a book of post-sale accounts and are accountable for renewal and expansion revenue
- Managers who lead onboarding, implementation or professional services teams handing customers into steady-state use
- Support and service desk managers whose teams feed account risk signals to customer success
- Account and relationship managers in subscription, software and managed service businesses
- Revenue operations and customer analytics managers who maintain retention reporting and health data

Course Outline:

Day 1: The Customer Success Function and the B2B Customer Journey

- Customer Success Versus Customer Service and Support: Proactive and Reactive Mandates
- Recurring Revenue Economics: Bookings, Renewals, Expansion and Revenue Leakage
- B2B Post-Sale Journey Map: Handover, Onboarding, Adoption, Renewal and Advocacy
- Coverage Tier Design: High-Touch, Low-Touch and Tech-Touch Segments
- Current-State Customer Success Maturity Scorecard

Day 2: Operating Models, Health Scoring and Retention Metrics

- Customer Success Operating Model Canvas: Roles, Charter and Capacity Ratios
- Outcome Definition Framework: Desired Outcomes and Success Criteria per Segment
- Customer Health Score Architecture: Usage, Engagement, Sentiment and Commercial Inputs
- Gross Revenue Retention, Net Revenue Retention and Logo Churn Formulas
- Customer Success Metrics Tree: Leading and Lagging Indicators

Day 3: Onboarding, Adoption and Success Planning in Daily Practice

- Onboarding Playbook with Time-to-Value Milestones and Exit Criteria
- Product Adoption Analytics: Feature Breadth, Depth and Active User Ratios
- Joint Success Plan Template with Customer Stakeholders
- Executive Business Review Deck Structure and Value Realisation Summary
- Sales-to-Success and Success-to-Support Handoff Checklists

Day 4: Renewals, Expansion, Churn Risk and Scaling

- Renewal Forecasting Calendar and Risk-Weighted Renewal Pipeline
- Expansion Signal Qualification: Seat Growth, New Use Cases and Upgrade Triggers
- Churn Signal Catalogue and Save Play Library for At-Risk Accounts
- Revenue Operations Basics: Shared Definitions, Data Flows and Forecast Cadence
- Digital Customer Success Programmes: Automated Journeys, Community and In-Product Guidance

Day 5: Modelling Build: Customer Success Playbook and Health Score Model

- Case Company Brief: Subscription Software Provider with Rising Downgrades
- Weighted Health Score Model Build and Calibration Against Past Cancellations
- Net Revenue Retention Bridge: Starting Base, Expansion, Contraction and Churn
- Customer Success Playbook Drafting: Segments, Plays, Owners and Triggers
- Playbook Presentation and Peer Challenge on Score Weights and Save Plays

Skills You Will Gain:

- Customer Success Operating Model Design
- Time-to-Value Planning
- Usage Data Interpretation
- Health Score Calibration
- Renewal Pipeline Forecasting
- Expansion Opportunity Qualification
- Retention Metric Reporting
- Cross-Team Handoff Management

Why Attend This Course:

- Return with a Customer Success Playbook and a Weighted Health Score Model tested on a case company and challenged by peers
- Spot stalled onboarding and falling usage months before a renewal date, while there is still time to act
- Walk into renewal and business review meetings with evidence of the value each customer has received
- Compare coverage models and retention practice with customer success peers from software, services and subscription sectors

Conclusion:

Recurring revenue is protected and grown after the contract is signed, through measured adoption, early risk detection and planned renewal work. The course moves from the customer success mandate and post-sale journey, through operating models, health scores and retention formulas, to onboarding, adoption analytics, success plans and handoffs, and then to renewals, expansion, save plays, revenue operations and digital programmes. The final day builds a Customer Success Playbook with a Weighted Health Score Model and a revenue retention bridge for a case company.