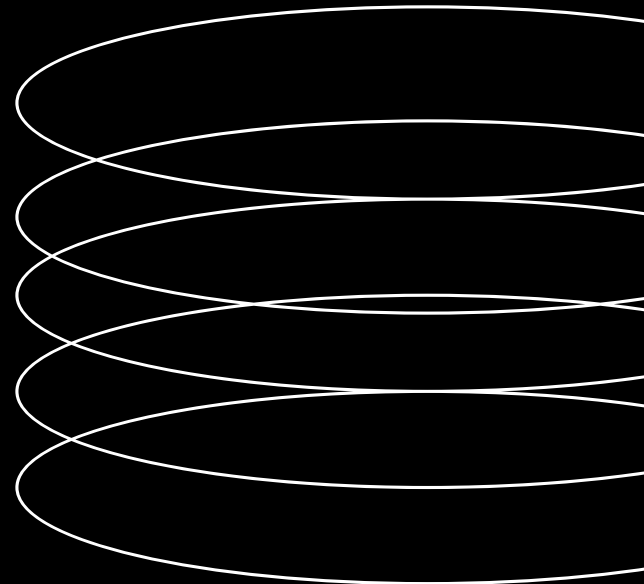Diagnose Exactly Why Customers Are Churning

The B2B Customer Retention Health Check

WHAT'S INSIDE

- Customer Journey Gap Analysis
- Retention Program Maturity Assessment
- Churn Risk Prediction Model
- Revenue Impact Calculator for Retention Improvements

The Author

MARISSA HOMERE

Marissa Homere is a seasoned B2B marketing strategist with over 15 years of experience driving growth and building messaging that resonates. Known for her deep expertise in product marketing and go-to-market execution, Marissa has spent the last few years quietly and effectively integrating AI into marketing strategies—not as a gimmick, but as a scalable, strategic lever for smarter, faster growth.

With a background working across high-growth startups and enterprise organizations, she brings a pragmatic, results-driven lens to marketing innovation. Marissa specializes in translating complex technologies into clear, actionable narratives that move markets—and now, she's doing the same with AI.

This eBook distills her hands-on learnings into practical insights, helping marketers cut through the hype and use AI tools to work more efficiently, make better decisions, and build campaigns that actually convert.

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The Hidden Revenue Killer

CUSTOMER CHURN IS BANKRUPTING YOUR GROWTH

While you're focused on acquiring new customers, your existing customers are quietly evaluating alternatives, questioning their renewal decisions, and preparing to leave.

Here's the math that should terrify you:

- A 5% improvement in retention can increase profits by 25-95%
- B2B industries typically lose 10-30% of customers annually
- It costs 5-25x more to acquire a new customer than retain an existing one
- Most B2B companies spend only 15% of their effort on customer retention

The Retention Reality: Your customer success team can't solve retention alone. Your product team can't innovate fast enough to prevent all churn. Your sales team can't discount their way to loyalty.

Customer retention is a marketing problem that requires a marketing solution.

What This Health Check Reveals:

- Which customers are at highest risk of churning (and why)
- Where your customer journey is failing your best customers
- How much revenue you're losing to preventable churn
- What changes will have the biggest impact on retention

Customer Journey Gap Analysis

For each stage, rate your current performance from 1 (major gaps) to 5 (excellent experience)

Stage 1: Onboarding (Months 1-3)
☐ We have a structured onboarding process that ensures customer success
☐ We provide educational content that helps customers maximize value
☐ We proactively identify and address implementation challenges
☐ We measure and optimize time-to-value for new customers
☐ We have clear success milestones and celebrate achievements with customers

Score: ___/25
Biggest Gap: _____

Stage 2: Value Realization (Months 4-12)
☐ We help customers understand and measure the ROI they're getting
☐ We provide ongoing education about advanced features and use cases
☐ We share industry insights and best practices relevant to their business
☐ We connect customers with peers and create community experiences
☐ We proactively suggest optimizations and improvements

Score: ___/25
**Biggest Gap:** _____

Stage 3: Growth and Expansion (Year 2+)
☐ We identify and communicate expansion opportunities based on customer success
☐ We help customers integrate our solution more deeply into their processes
☐ We provide strategic consulting and account planning services
☐ We create opportunities for customers to become advocates and references
☐ We stay ahead of their evolving needs and industry changes

Score: ___/25
Biggest Gap: _____
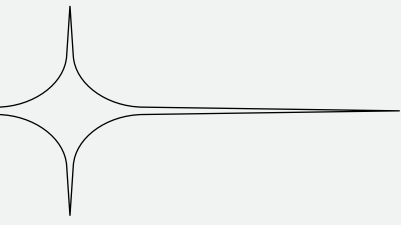
Stage 4: Renewal and Loyalty (Ongoing)
☐ We maintain regular communication between formal renewal periods
☐ We provide data and insights that prove ongoing value and ROI
☐ We help customers build internal business cases for renewal
☐ We address competitive threats and differentiate our value
☐ We make the renewal process simple and focused on future value

Score: __/25
Biggest Gap: _____

Total Customer Journey Score: __/100

Journey Health Assessment:

- **80-100:** Your customer journey supports strong retention
- **60-79:** You have significant gaps that are likely causing churn
- **40-59:** Your customer journey is failing your customers
- **Below 40:** You need a complete customer journey overhaul
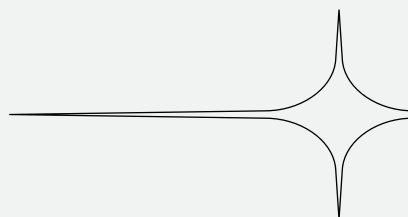
Retention Program Maturity Assessment

For each section, rate your current performance from 1 (major gaps) to 5 (excellent experience)

Marketing to Existing Customers
☐ We have dedicated marketing campaigns for existing customers
☐ We create content specifically for customer education and success
☐ We segment customers based on health scores and engagement levels
☐ We have automated campaigns triggered by customer behavior
☐ We measure the impact of customer marketing on retention and expansion

Score: __/25

Customer Intelligence and Analytics
☐ We track customer health scores and engagement metrics
☐ We can predict which customers are at risk of churning
☐ We understand the leading indicators of customer success and failure
☐ We regularly analyze churn patterns and root causes
☐ We have dashboards that show customer retention performance in real-time

Score: __/25

Cross-Functional Collaboration
☐ Marketing, sales, and customer success work together on retention
☐ We have shared goals and metrics for customer retention
☐ We have regular communication and coordination between teams
☐ We share customer insights and feedback across all teams
☐ We have integrated systems and data sharing for customer management

Score: __/25
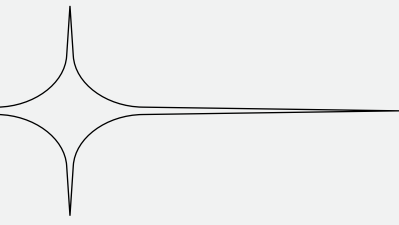
Expansion and Upselling

☐ We have systematic processes for identifying expansion opportunities
☐ We create marketing campaigns that support upselling and cross-selling
☐ We help customers understand additional value they could be getting
☐ We time expansion offers based on customer success and satisfaction
☐ We measure expansion revenue as a key retention metric

Score: ___/25

Total Retention Program Score: ___/100

Program Maturity Level:

- **80-100:** Advanced retention program with strong processes
- **60-79:** Developing program with room for improvement
- **40-59:** Basic retention efforts that need significant enhancement
- **Below 40:** No systematic retention program in place
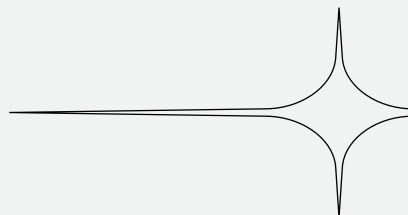
Churn Risk Prediction Model

Early Warning Signals Checklist
For each signal, rate how well you currently track and respond to it:
1 = Don't track, 2 = Track but don't act, 3 = Track and sometimes act, 4 = Track and usually act, 5 = Track and always act

Engagement Signals
☐ Declining product usage or login frequency
☐ Reduced engagement with marketing content and communications
☐ Fewer support requests or help desk interactions
☐ Lower participation in training, webinars, or community events
☐ Decreased response rates to surveys and feedback requests

Score: __/25

Relationship Signals
☐ Primary contact person leaves the company or changes roles
☐ New stakeholders or decision-makers join the account
☐ Reduced communication frequency with account team
☐ Negative feedback or complaints about service or product
☐ Mentions of evaluating alternatives or competitive solutions

Score: __/25

Business Signals
☐ Customer's company undergoes restructuring, layoffs, or leadership changes
☐ Budget cuts or cost reduction initiatives at customer company
☐ Changes in customer's business model or strategic direction
☐ Industry disruption or regulatory changes affecting customer
☐ Customer fails to achieve expected ROI or business outcomes

Score: __/25
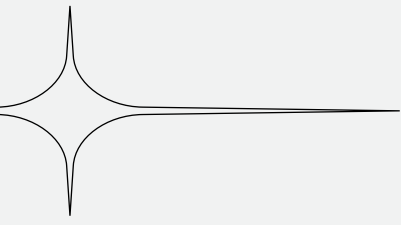
Behavioral Signals

☐ Late payments or requests for payment extensions
☐ Decreased renewal discussion engagement or responsiveness
☐ Requests for contract modifications or service reductions
☐ Escalation of issues to higher levels of management
☐ Reduced participation in strategic planning or roadmap discussions

Score: __/25

Total Churn Prediction Score: __/100

Churn Risk Assessment Capability:

- **80-100:** You can predict and prevent most churn
- **60-79:** You catch some churn risks but miss others
- **40-59:** You're reactive to churn rather than predictive
- **Below 40:** You're surprised by most customer departures
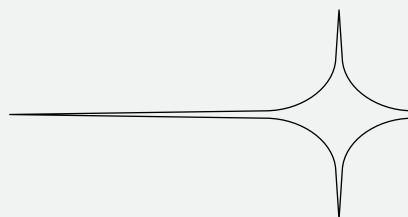
Revenue Impact Calculator

CALCULATE THE FINANCIAL IMPACT OF RETENTION IMPROVEMENTS

STEP 1: CURRENT RETENTION PERFORMANCE

TOTAL NUMBER OF CUSTOMERS: _____

ANNUAL CHURN RATE: % _____

AVERAGE CUSTOMER VALUE (ANNUAL): $_____

CUSTOMER LIFETIME (YEARS): _____

CURRENT ANNUAL CHURN LOSS: NUMBER OF CUSTOMERS

× CHURN RATE × AVERAGE CUSTOMER VALUE = $_____

STEP 2: RETENTION IMPROVEMENT PROJECTIONS

(INDUSTRY BENCHMARKS: 5% RETENTION IMPROVEMENT =

25-95% PROFIT INCREASE)

TARGET CHURN RATE REDUCTION: _____%

EXPECTED CUSTOMER LIFETIME EXTENSION: _____ YEARS

PROJECTED EXPANSION REVENUE INCREASE: _____%

STEP 3: FINANCIAL IMPACT CALCULATION

CHURN REDUCTION VALUE: CUSTOMERS SAVED FROM CHURN × AVERAGE

CUSTOMER VALUE = $_____

LIFETIME VALUE INCREASE: TOTAL CUSTOMERS × AVERAGE VALUE × LIFETIME

EXTENSION = $_____

EXPANSION REVENUE INCREASE: CURRENT EXPANSION REVENUE × PROJECTED

INCREASE = $_____

TOTAL ANNUAL REVENUE IMPACT: $_____

STEP 4: INVESTMENT VS. RETURN

RETENTION PROGRAM INVESTMENT: TECHNOLOGY AND TOOLS: $_____

STAFF AND RESOURCES: $_____

CONTENT AND CAMPAIGNS: $_____

TRAINING AND DEVELOPMENT: $_____

TOTAL INVESTMENT: $_____

ROI CALCULATION:

(REVENUE IMPACT - INVESTMENT) / INVESTMENT × 100 = _____%

PAYBACK PERIOD:

INVESTMENT / (REVENUE IMPACT / 12) = _____ MONTHS

90-Day Customer Retention and Churn Reduction Action Plan

PHASE 1: ASSESSMENT AND FOUNDATION (DAYS 1-30)

Week 1: Customer Intelligence

- Analyze historical churn data to identify patterns and root causes
- Segment customers by health score, engagement level, and churn risk
- Interview recent churned customers to understand their decision process
- Survey existing customers about satisfaction and likelihood to renew

Week 2: Journey Mapping

- Map the complete post-purchase customer journey
- Identify gaps and friction points in the customer experience
- Document current retention efforts and their effectiveness
- Benchmark retention performance against industry standards

Week 3: Cross-Functional Alignment

- Align marketing, sales, and customer success on retention goals
- Establish shared metrics and reporting for customer retention
- Create communication processes for sharing customer insights
- Define roles and responsibilities for retention activities

Week 4: Technology and Data Setup

- Implement customer health scoring and early warning systems
- Set up automated alerts for churn risk indicators
- Create dashboards for tracking retention metrics
- Integrate customer data across all systems

PHASE 2: PROGRAM DEVELOPMENT (DAYS 31-60)

Week 5-6: Content and Campaign Creation

- Develop customer success content for each journey stage
- Create re-engagement campaigns for at-risk customers
- Build expansion opportunity identification campaigns
- Design advocacy and reference programs

Week 7-8: Process Implementation

- Launch customer health monitoring and response processes
- Implement regular customer check-in and feedback cycles
- Start proactive outreach to at-risk customers
- Begin expansion opportunity development programs

PHASE 3: OPTIMIZATION AND SCALE (DAYS 61-90)

Week 9-10: Testing and Refinement

- A/B test different retention campaign approaches
- Optimize customer journey touchpoints based on feedback
- Refine churn prediction models based on new data
- Test different intervention strategies for at-risk customers

Week 11-12: Scaling and Systematization

- Scale successful retention programs across all customer segments
- Automate repetitive retention processes and communications
- Train team on new retention processes and tools
- Establish ongoing optimization and improvement cycles

Advanced Retention Strategies

PREDICTIVE RETENTION MARKETING

Use AI and machine learning to predict churn risk months in advance and automatically trigger appropriate intervention campaigns.

STAKEHOLDER EXPANSION PROGRAMS

Create marketing programs that help your champion introduce your solution to new team members and stakeholders within their organization.

## COMPETITIVE INTELLIGENCE AND DEFENSE

Monitor competitive threats to your customers and create campaigns that reinforce your unique value and switching costs.

VALUE REALIZATION CONSULTING

Provide strategic consulting services that help customers achieve maximum ROI from your solution, making them less likely to churn.

CUSTOMER ADVOCACY DEVELOPMENT

TTurn satisfied customers into advocates who can influence prospects and provide competitive defense through references and case studies.
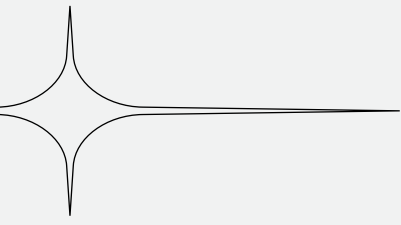
ADVANCED RETENTION METRICS

Leading Indicators:
- Customer health score trends
- Engagement velocity changes
- Stakeholder involvement levels
- Value realization progress

Lagging Indicators:
- Net revenue retention rate
- Customer lifetime value
- Gross churn vs. net churn
- Expansion revenue percentage

Questions for Advanced Assessment:

- How quickly can you identify and respond to churn risks?
- What percentage of churn is preventable vs. unavoidable?
- How do you measure the ROI of retention marketing efforts?
- What's your process for turning at-risk customers into advocates?
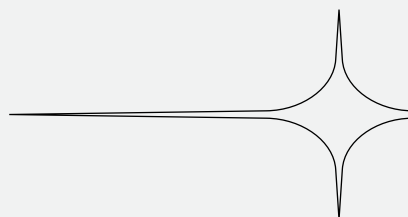
Additional Resources

IMMEDIATE ACTIONS

- Calculate your Personalization Maturity Score and identify your current level
- Complete the Technology Gap Analysis to understand your infrastructure needs
- Use the ROI Calculator to build a business case for personalization investment
- Begin Phase 1 of the 90-day improvement plan within the next week

ADVANCED PERSONALIZATION STRATEGIES:

- Predictive Personalization Use AI and machine learning to predict what content, offers, and experiences each prospect will respond to before they even request them.
- Cross-Channel Personalization Coordinate personalized experiences across email, website, social media, advertising, and sales outreach for consistent, relevant messaging.
- Real-Time Personalization Adjust content, recommendations, and experiences in real-time based on current behavior and context.
- Account-Based Hyper-Personalization Create completely custom experiences for high-value accounts, including personalized microsites, custom content, and bespoke campaigns.

QUESTIONS FOR DEEPER ASSESSMENT:

- How quickly can you personalize experiences for new prospects?
- What percentage of your content is personalized vs. generic?
- How do you measure the business impact of personalization efforts?
- What's preventing you from scaling personalization across more touchpoints?

AI Marketing Resources

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THE COMPLETE AI MARKETING TRANSFORMATION BUNDLE

AI MARKETING ROI CALCULATOR

Free Resouces

B2B MARKETING ROI REALITY CHECK KIT

B2B EMAIL MARKETING AUDIT TOOLKIT