EOS Core Process: Customer Retention and Upselling

Process Owner: [Person from EOS Accountability Chart]
Last Updated: [Date]
Review Date: [Next quarterly review date]

EOS Integration

Connected EOS Tools:
Related EOS Rocks: [Current quarter Rocks that improve this process]
EOS Scorecard Metrics: [Weekly numbers tracked for this process]
Accountability Chart Connection: [Which seat owns this process]

Process Overview

Purpose: To proactively maintain customer relationships, ensure ongoing value delivery, identify expansion opportunities, and maximize customer lifetime value while preventing churn and building long-term partnerships.

High-Level Steps

1. Customer health monitoring and assessment
2. Regular check-in and relationship maintenance
3. Value delivery tracking and reporting
4. Expansion opportunity identification
5. Upsell/cross-sell conversation planning
6. Proposal development and presentation
7. Renewal process management
8. Customer advocacy and reference development

Core Process Detailed Steps

Step 1: Customer Health Monitoring (Weekly, 15 minutes)
- Review usage analytics and engagement metrics
- Monitor support ticket volume and sentiment
- Check payment status and billing issues
- Assess overall account satisfaction score
- Flag any at-risk indicators for immediate attention

Step 2: Regular Check-ins (Monthly, 30 minutes)
- Schedule recurring check-in calls with key contacts
- Review business objectives and success metrics
- Gather feedback on product performance and satisfaction
- Identify any challenges or areas for improvement
- Maintain relationship with decision-makers and influencers

Step 3: Value Delivery Tracking (Quarterly, 45 minutes)
- Document measurable outcomes and ROI achieved
- Create value report showing impact and results
- Compare current state to original goals and baseline
- Gather testimonials and success stories
- Present value summary to executive stakeholders

Step 4: Expansion Opportunity Identification (Ongoing)
- Monitor for growth signals (new hires, funding, expansion)
- Identify underutilized features or services
- Listen for pain points that additional products could solve
- Track contract renewal dates and expansion timing
- Maintain awareness of budget cycles and planning periods

Core Process Detailed Steps (cont.)

Step 5: Upsell/Cross-sell Planning (2 weeks before approach)
- Research specific expansion opportunities
- Quantify potential value and ROI of additional solutions
- Prepare case studies relevant to their expansion needs
- Coordinate with technical teams for demonstration
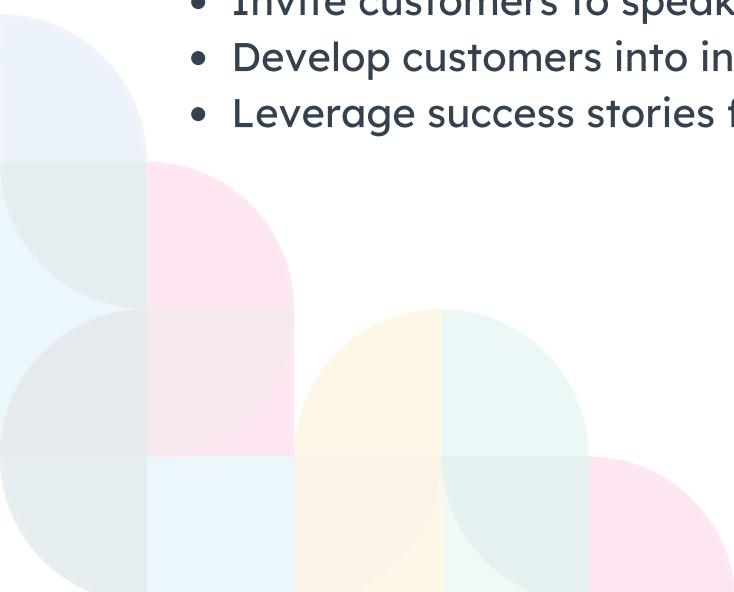- Plan timing around their budget and decision cycles

Step 6: Expansion Proposal (60-90 minutes)
- Present expansion opportunity in context of current success
- Demonstrate clear connection between new needs and solution
- Show projected ROI and value of additional investment
- Provide implementation timeline and resource requirements
- Address any concerns about change management or disruption

Step 7: Renewal Management (90 days before expiration)
- Begin renewal conversations well in advance
- Review contract terms and pricing for renewal
- Address any concerns or requests for changes
- Negotiate renewal terms and any expansion components
- Secure renewal commitment and execute new agreement

Step 8: Advocacy Development (Ongoing)
- Identify satisfied customers willing to provide references
- Request case study participation and testimonials
- Invite customers to speak at events or webinars
- Develop customers into industry advocates and champions
- Leverage success stories for new prospect conversations

Quality Standards & Success Metrics

Must-Have Standards:
[ ] Standard 1 (measurable)
[ ] Standard 2 (measurable)
[ ] Standard 3 (measurable)

EOS Scorecard Metrics:
Weekly Metric 1: [Target number]
Weekly Metric 2: [Target number]
Monthly Metric: [Target number]

Accountability:
- Customer Success Manager: Owns relationship and health monitoring
- Account Executive: Manages expansion sales and renewals
- Support Team: Provides product assistance and technical help
- Marketing: Develops case studies and reference materials

Frequency:
- Health monitoring: Weekly
- Customer check-ins: Monthly
- Value reporting: Quarterly
- Renewal discussions: 90 days before expiration

Sample Success Metrics (adjust for your team + create Scorecards):
- Customer retention rate (target: >90%)
- Net revenue retention (target: >110%)
- Upsell/cross-sell conversion rate (target: >20%)
- Customer satisfaction score (target: >4.5/5)
- Time to renewal signature (target: <30 days from start of process)
- Number of customer references generated annually

Process Connections

Receives From: [Which EOS core process feeds into this one]
Hands Off To: [Which EOS core process this feeds into]
Dependencies: [Other processes or resources needed]

Tools & Resources

Required Systems/Tools:

Tool 1
Tool 2

Template/Document links

Training Materials:
Link to training video
Link to detailed SOPs (if needed)
Onboarding checklist

Troubleshooting & Common Issues

If [Problem], Then [Solution]:
Problem 1 → Solution 1
Problem 2 → Solution 2
Problem 3 → Solution 3
Escalation: [When to involve process owner or leadership team]

Process Improvement

Last Quarter's Improvements: [What was changed and why]
Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]
Issue 1
Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]
Leadership Team Review: [Date reviewed in Level 10 or quarterly]
Next Review Date: [Align with EOS quarterly cycle]

Quick Reference Card

[One-page summary of key steps for daily use]

The 5 Key Steps:

[Step 1 summary]
[Step 2 summary]
[Step 3 summary]
[Step 4 summary]
[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]