Pipeline Works

Built to reduce churn risk, accelerate activation, and drive expansion revenue.

Fix Customer Drop-offs Before They Become Churn

Customer Success Operating System for Early-Stage SaaS Teams

• No CRM required • Built for messy, early-stage pipelines • Designed to drive activation, retention, and expansion

Identify at-risk accounts before they churn	**Prioritise high-value customers and actions**	**Track usage signals that actually matter**	**Run a weekly system that drives execution**

Built from real-world B2B SaaS workflows across acquisition → onboarding → retention

1 The Problem

Early-stage SaaS teams run customer success on memory, Slack messages, and gut feel. By the time churn is visible, it is too late to act.

What breaks without a system

- No visibility into customer health — risk is invisible until the customer cancels.
- Churn shows up late — by the time you see it, the decision is already made.
- No structured follow-ups — accounts go silent and CSMs don't notice.
- Expansion is accidental — opportunities are missed because no one is tracking signals.

The result

- Revenue at risk is invisible until it's too late
- Expansion revenue is missed due to lack of signal tracking
- Retention becomes reactive, not predictable.

> **The fix**
> A simple, objective system that tracks health, risk, revenue impact, and next actions — built entirely in Excel. No tools. No budget. No excuses.
> This system makes **risk, value, and revenue impact** visible early enough to act.

2 The Solution

A structured operating system with five layers — each feeding the next. Built in Excel. Designed to answer three questions every week:

- Who is at risk?
- Who has not seen value?
- Where can I expand?

Layer	What It Tracks
A — Account Master	Account name, segment, ARR, lifecycle stage, owner, renewal date
B — Activity Tracking	Last interaction, next touchpoint, days since contact — prevents silent churn
C — Usage Model	Breadth (active users % of seats) + Depth (key feature used) — separates logins from value
D — Risk Scoring Engine	Objective 5-signal model: usage, activity, renewal proximity, open issues
E — Revenue Layer	ARR, Risked ARR, expansion potential, priority (P1/P2/P3). This layer turns customer success into a measurable revenue function.

3 System Structure

A — Account Master

One row per customer. The control panel for your entire portfolio.

- Account name — one row, never merged.
- Segment — SMB / Mid / Enterprise. Enterprise accounts require higher check-in frequency.
- Plan ARR — annual contract value as a plain number. High value + High risk = act first.
- Lifecycle stage — Onboarding / Active / At Risk / Expansion. Update every week.
- Owner — CSM responsible for this account.
- Renewal date — used to calculate Days to Renewal and trigger urgency signals.

B — Activity Tracking

Engagement rhythm is the single most powerful early warning signal. **Lack of activity** is the earliest leading indicator of churn.

- Last Activity Date — last real touchpoint (call, email reply, live QBR). Auto-flags red if more than 14 days old.
- Next Check-in Date — scheduled next contact. Overdue Flag auto-calculates when this date passes.
- Days to Renewal — tracks urgency. Under 30 days triggers a risk signal in the scoring model.
- Coverage — Single or Multi-threaded. Single contact = one departure away from losing the account.

> **Non-negotiable rule**
> If there is no Next Check-in Date, the account is already decaying. Fill it in after every single call.

C — Usage Model (2-Layer)

High logins do not mean value. Low logins do not always mean churn. You need both layers.

Layer	Metric	What It Tells You
Layer 1: Breadth	% active users vs purchased seats	Is adoption happening across the team?
Layer 2: Depth	Key feature used (Y/N)	Is the customer getting the core value they bought for?
Usage Score	Auto-calculated (0–4)	Feeds directly into the Risk Score. No manual input.

Scoring: Active users < 30% → +2 risk points. Key feature not used → +2 risk points.

How to say it in interviews: "I track both adoption breadth and feature-level depth to understand whether customers are realising value — not just logging in."

D — Risk Scoring Engine

Risk is not an opinion. It is a calculated score from five objective signals. Every account gets a score every week — automatically.

This converts customer health from opinion into a measurable risk score.

Signal	Points	Why It Matters
Active users < 30% of purchased seats	+2	Breadth of adoption is failing
Key feature not used	+2	Customer is not realising core value
No CSM activity in 14+ days	+2	Account is going dark
Renewal in fewer than 30 days	+1	Urgency — accelerates all other risks
Open issues or complaints	+2	Trust is eroding

Score	Band	Colour	Action required
0 – 2	Healthy	Green	Maintain engagement. Look for expansion signals.
3 – 4	Watch	Yellow	Schedule check-in within 5 business days. Diagnose root cause.
5+	At Risk	Red	Act within 24 hours. P1 or P2 priority. Escalate if no response.

Health vs Risk column

The Health column (auto-calculated) reflects the objective score. The Risk column is your manual override — use it when you have context the model cannot see. Manual judgement always wins.

E — Revenue Layer

CS is a revenue function, not a support function. Every account has a financial weight. The revenue layer makes that visible.

- **Risked ARR:** Red health = 100% of ARR at risk. Yellow health = 50% of ARR at risk. Green = 0. This is the number that gets leadership attention.
- **Priority:** P1 = Red health + ARR > threshold. P2 = Red health (any ARR) or Yellow health. P3 = Green. Filter P1 every Monday morning.
- **Expansion Signal:** Non-empty = counted in the summary. Track expansion type (upsell / cross-sell / seat expansion / new module) and estimated value.
- **First Value Achieved:** Y / N. The most critical early-stage signal. N after 60 days of go-live → escalate internally. No first value = churn risk, regardless of Risk Score.
- **Stakeholder Coverage:** Single contact = one departure away from losing the account. Multi-threaded accounts are structurally safer.

This is the number you escalate internally — not ‘accounts at risk’, but ‘revenue at risk’.

4 Dashboard — Decision Layer

Four elements. No more. The dashboard answers one question: what do I act on right now?
The goal is not visibility. The goal is immediate action on revenue risk.

#	Element	What It Shows
1	KPI Strip	Total ARR, Risked ARR, % accounts at risk, renewals due in 30 days. Updated automatically from the tracker.
2	Accounts by Health	Bar chart — Green / Yellow / Red distribution. If Red is growing, you have a systemic problem to escalate.
3	Risked ARR by Segment	Bar chart — where your revenue risk is concentrated. Enterprise-heavy risk = leadership conversation, not just a CSM call.
4	Top At-Risk Accounts Table	Sorted by ARR. Columns: Account, ARR, Health, Risk Score, Risk Reason, Expansion Signal, Priority, Next Action.

> **Portfolio framing for leadership**
> "We have ₹4,80,000 of ARR at risk this quarter across 2 Red accounts and 1 Yellow account. The largest single exposure is Axis Fintech at ₹4,20,000." That is a revenue conversation, not a CS update.

5 Weekly Operating Rhythm

Run this every week. 20 minutes to decide. The rest of the week to execute.

When	What to do
Monday	Open dashboard. Identify P1 and P2 accounts. Review Risk Score changes from last week. Update risk reasons where needed.
Tuesday – Thursday	Reach out to at-risk accounts. Solve active blockers. Drive feature activation for low-usage accounts. Document every touchpoint.
Friday	Focus on expansion accounts — high health, high usage. Propose upgrades, additional use cases, or new team seats.
After every call	Update: Last Activity Date, Next Check-in Date, Active Users %, Key Feature Used, Open Issues count, Action (next step with date). Formulas recalculate automatically.

6 Action Playbook

Four trigger scenarios. Each has a defined response. No guesswork.

Trigger	Signal	Response
Low Usage	Active users < 30% OR key feature not used	Drive feature activation to reach first value quickly. Share quick-start guide. Identify activation blocker and own its resolution.
No Activity	Last contact > 14 days OR Overdue Flag = OVERDUE	Trigger re-engagement email. Reference their use case. Schedule a call — do not leave it open-ended.
Renewal Risk	Renewal < 30 days AND Health = Yellow or Red	Share a value summary (what has changed for them since go-live). Align on ROI. Get a verbal commitment before the renewal date.
Expansion Signal	High usage + multi-threaded + First Value = Y	Introduce advanced features or adjacent use cases. Propose additional seats or modules. Loop in AE for commercial discussion.

7 Tracker Column Map

Every concept in this playbook maps to a specific column in the Excel tracker. This is your reference.

Col	Field	Notes
A	Account ID	ACC-001 format. Never reuse an ID.
B	Account Name	One row = one customer.
C	Segment	SMB / Mid / Enterprise. Drop-down.
D	Stage	Onboarding / Active / At Risk / Expansion. Drop-down.
E	Plan ARR	Annual contract value. Formatted ₹#,##0.
F	Owner	CSM responsible.
G	Last Activity Date	Auto-turns red if >14 days old.
H	Next Check-in Date	Drives the Overdue Flag (col X).
I	Active Users %	Layer 1 usage. Formatted as percentage.
J	Key Feature Used	Layer 2 usage. Y / N drop-down.
K	Usage Score	Auto-calculated. 0–4. Feeds Risk Score.
L	Coverage	Single / Multi. Single = structural churn risk.

M	Open Issues	Count. Any value > 0 adds +2 to Risk Score.
N	Days to Renewal	Under 30 days adds +1 to Risk Score.
O	Risk Score	Auto-calculated. Sum of all 5 signals.
P	Health	Auto-calculated. Green / Yellow / Red band.
Q	Risk	Manual override. Your judgement layer.
R	Risk Reason	Drop-down. Must not be blank if Risk ≠ None.
S	Expansion Signal	Non-empty = counted in summary metrics.
T	Expansion Type	Upsell / Cross-sell / Seat expansion / New module.
U	Expansion Value	Estimated additional ARR if expansion closes.
V	First Value	Y / N. N after 60 days → escalate.
W	Renewal	On Track / Risk / Unknown. Drop-down.
X	Overdue Flag	Auto-calculated. OVERDUE if today > Next Check-in.
Y	Priority	Auto-calculated. P1 / P2 / P3.
Z	Risked ARR	Auto-calculated. Red = 100% of ARR. Yellow = 50%.
AA	Action (Next Step)	Verb + date. Required. No next step written = no next step happening.

8 Who Should Use This

This system is built for teams where CS does not yet have dedicated tooling. Best suited for teams where **revenue impact per account is high and losing even 1 customer matters.**

- SaaS teams managing 0–50 active customers.
- Founders who are personally handling customer success.
- CSMs joining early-stage companies without a CRM or CS platform.
- RevOps or Sales Operations professionals building CS infrastructure from scratch.

What this system enables

- **Early churn detection:** Identify churn risk before the customer decides to leave.
- **Clear prioritisation:** P1/P2/P3 logic tells you exactly where to spend Monday morning.
- **Structured customer engagement:** Activity tracking and the overdue flag eliminate silent accounts.
- **Revenue-focused decision making:** Convert customer success into measurable revenue impact. Risked ARR and the dashboard make CS a commercial conversation.

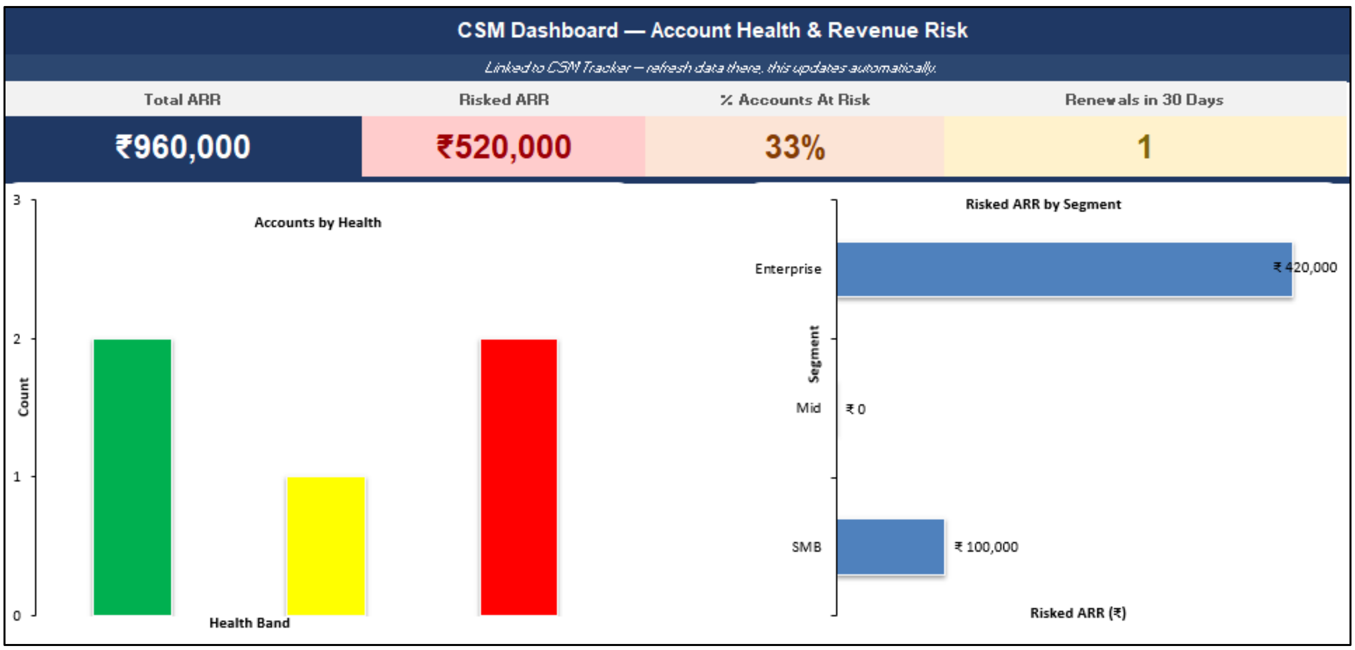
9 Five Non-negotiable House Rules

- **Rule 1:** Active Users % and Key Feature Used must be updated every week. Stale usage data = wrong Risk Score = wrong priorities.

- **Rule 2:** The Action column starts with a verb and ends with a date. 'Follow up' is not an action. 'Send ROI summary by May 3' is an action.
- **Rule 3:** Risk Reason must never be blank when Health is Yellow or Red. A risk without a reason cannot be actioned.
- **Rule 4:** Risked ARR is a communication tool. Use it in internal reviews: 'We have ₹4,80,000 at risk this quarter' gets leadership attention faster than 'a few accounts are struggling.'
- **Rule 5:** Keep it to active accounts only. Archive churned accounts. A cluttered tracker is an unused tracker.

10 Next Steps

The **CSM tracker** that brings this framework to life is available for download on my website. Dashboard snapshot below.



If you're managing customers without clear visibility into risk, value, and expansion — this system gives you a starting point.

- Download tracker
- Explore system
- Apply immediately

You can explore more here:

Website: Pipeline Works

Schedule a conversation: Click here