Driving Retention & Growth with Customer Health Score Analytics

The Challenge

Teams without a unified, KPI-driven view of customer health needed to evolve from reactive management to a standardized, predictive model that consolidates data sources, delivers actionable insights, and enables proactive engagement. This required them to:

- Consistently identify churn-risk customers across all segments
- Establish a KPI-driven, pillar-based evaluation framework
- Make insights interpretable and usable for multiple stakeholders
- Predict future behavior to time interventions and optimize engagement

Impact Delivered

- Improved retention
- Higher CLV & upsell
- Early churn intervention
- Predictive insights

The Solution

A weighted Customer Health Score (CHS) with dashboards and CRM integration:

- 6-pillar CHS framework: Robust health definition across six key pillars.
- Pillar-wise KPIs & scores: Detailed metrics and scores by pillar.
- Weighted overall score: Single composite CHS for a unified view.
- Segmentation: Red/Orange/Green tiers to prioritize actions and resources.
- Insightful Tableau dashboards: Context on dynamics, sentiment, market activity, and support levels.
- CRM integration: Centralized data and embedded workflows for action.
- Delivered assets (from source): 25 KPIs; 50 Tableau dashboards; 15 data pipelines; 50 dbt models; ~10,000 LOC; 5 production releases; advanced analytics & ML models.

Solution Components

- Tableau; dbt
- CRM integration
- Data pipelines
- Advanced analytics/ML

The Results

The CHS program standardized visibility and enabled proactive management:

- Proactive risk management: Earlier detection and intervention improved retention.
- Deeper customer understanding: Clear read on satisfaction and relationship health.
- Predictive behavior: Forward-looking guidance for timely engagement.
- Revenue impact: Higher CLV through targeted upsell/cross-sell opportunities.
- Data-driven decisions: Consistent, actionable insights across sales, success, support, and leadership.