

CUSTOMER SUCCESS · WORKSHEET

Customer Health Score Worksheet & CS Playbook Outline

A per-account scoring tool plus a lightweight playbook for founders and early teams running customer success without a dedicated CSM.

How to use this: Fill in one row of the scoring table per account each month, then use the playbook section to define your standard response for each tier before you need it.

Account Health Score Inputs

Score each account 1 (poor) to 3 (strong) on each input, then total. 10-12 = green, 7-9 = yellow, below 7 = red.

Account	Product Usage Trend (1-3)	Support Ticket Volume / Sentiment (1-3)	NPS / Feedback (1-3)	Exec Engagement (1-3)	Total Score	Tier (Green / Yellow / Red)

Scoring Definitions

Reference these before scoring so the numbers mean the same thing every month.

What does a '3' (strong) look like for product usage trend at this stage of your product?

What does a '1' (poor) look like for support ticket volume/sentiment?

What counts as meaningful executive engagement for your typical customer size?

Minimum Touchpoint Cadence

- ☐ Week 1: structured welcome sequence sent or completed
- ☐ Day 30: first check-in call or async check-in completed
- ☐ Day 60: usage pattern review completed
- ☐ Month 3+: quarterly review conversation scheduled and held
- ☐ At-risk accounts moved to weekly or biweekly cadence
- ☐ Cadence and outcomes logged somewhere the whole team can see

Quarterly Review Substitute: Standing Agenda

Use these four questions verbatim on every account's quarterly call. Keep it to 20 minutes.

What's working well for you right now?

What's not working, or what's been frustrating?

What's one metric or outcome that shows the value you're getting?

What's coming up for you in the next quarter (budget, roadmap, team changes) that we should know about?

CS Playbook: New Customer Signals & Actions

Define the default motion for every new account so onboarding doesn't depend on memory.

What must happen in the first 7 days for a new customer, no exceptions?

Who owns the welcome/onboarding sequence today?

What does 'successfully onboarded' look like, concretely, so you know when to stop hand-holding?

CS Playbook: At-Risk Signals & Standard Response

- ☐ Usage drop of more than X% month-over-month flagged automatically or manually
- ☐ Two or more support tickets with negative sentiment in 30 days triggers a call
- ☐ No response to two consecutive check-in attempts triggers exec-level outreach
- ☐ Champion leaves or changes role triggers immediate re-engagement with new stakeholder
- ☐ Any red-tier account gets a response within 5 business days, owned by a named person

CS Playbook: Expansion Signals & Standard Response

- ☐ Usage consistently above plan limits for two+ consecutive months
- ☐ Unprompted positive feedback or request for a feature only on a higher tier
- ☐ Champion asks about adding seats, users, or teams
- ☐ Account has hit its stated success metric and is a candidate for a case study or referral ask
- ☐ Green-tier accounts reviewed quarterly for expansion readiness, not just renewal risk