

PREVIEW · CS AUDIT REPORT

Customer Success Audit

A two-week diagnostic.

Findings, risks, and a 90-day action list.

PREPARED FOR Acme Property Systems (illustrative)

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SCOPE End-to-end Customer Success function

DELIVERED Two weeks from kickoff

This document is an illustrative preview. The fictional company "Acme Property Systems" is used to show structure and depth. Real audits are tailored to the client's data, customers, and team.

01 · EXECUTIVE SUMMARY

What we found

Acme Property Systems has a strong product, a committed customer base, and growing ARR. The Customer Success function, however, is operating well below its potential and is the single largest constraint on the next phase of growth.

Gross retention is currently 84%. This is materially below the 90%+ benchmark for vertical SaaS at this stage and represents roughly £210k in preventable annual churn at current ARR. The three most material drivers are concentrated in identifiable, fixable parts of the customer lifecycle. Not in the product itself.

The headline numbers

METRIC	CURRENT	BENCHMARK	GAP
Gross retention (annual)	84%	92%	-8 pts
Net revenue retention	94%	108%	-14 pts
Time to first value	47 days	21 days	+26 days
Customers with active sponsor	62%	90%+	-28 pts
QBR completion rate	41%	85%+	-44 pts

Benchmarks drawn from comparable UK vertical SaaS at Series A/B stage.

02 · RISKS

The five risks driving most of the churn

Ranked by estimated revenue impact over the next 12 months. Each is addressable and most have a clear owner. The work isn't research, it's execution.

01 Single-threaded relationships at 60% of accounts

Most accounts have one named contact. When that person leaves, the renewal becomes a re-sale. Three of last year's lost customers fit this exact pattern. Estimated impact: £140k ARR at risk in the next 9 months.

02 Onboarding stretches well past first-value point

Average time to first measurable outcome is 47 days. Customers who hit value in under 30 days renew at 95%+ in your own cohort data; those who take 60+ renew at 71%. The longer ramp is silently selecting for churn.

03 No structured renewal motion

Renewal conversations begin 30–60 days out, by which point pricing is the only lever. No champion validation, no internal narrative, no executive visibility before the renewal email lands. £85k of last quarter's renewals were resolved in the final two weeks.

04 Health scoring is subjective and unevenly applied

Account status is set by the CSM's gut feel. Two of the four CSMs are systematically optimistic; the other two are systematically cautious. Leadership sees the same data and draws different conclusions.

05 QBRs are inconsistent and rarely actionable

Only 41% of mid-market accounts received a QBR in the last quarter. Those that did followed no consistent structure; few produced a written commitment from either side. QBRs are an opportunity surface, not a status meeting.

03 · OPPORTUNITIES

Where the upside lives

Each risk has a mirror opportunity. These aren't blue-sky ideas; they're the highest-leverage moves available to your current team in the next 90 days.

#	OPPORTUNITY	EXPECTED IMPACT
01	Multi-thread the top 20 accounts. Target three named contacts per account by end of Q2.	<i>Estimated retention lift: 4–6 points across the segment.</i>
02	Compress onboarding by sequencing for first-value. Re-order onboarding to deliver one measurable outcome inside 21 days, even if full implementation continues afterwards.	<i>Estimated retention lift in new cohort: 8 points.</i>
03	Build a 90-day renewal motion. Champion validation, internal narrative, executive touch: done six months out, not 60 days.	<i>Estimated impact: £120k–£180k of at-risk ARR re-secured in next 12 months.</i>
04	Standardise health scoring with three quantitative inputs (usage, relationship, commercial). Remove gut feel from the score; leave it in the conversation.	<i>Estimated impact: earlier intervention on 5–8 accounts per quarter.</i>
05	Mandate quarterly QBRs for all accounts above £20k ARR with a fixed five-slide template. Output: written commitments on both sides.	<i>Estimated retention lift: 3–5 points in the mid-market segment.</i>

04 · ACTION PLAN

The 90 days that follow

Concrete actions sequenced by impact, complexity, and dependency. The first 30 days are about stopping the bleed; the next 60 are about building the systems that hold.

WHEN	ACTION	OWNER
Days 1–30	Multi-thread top 20 accounts. CSM owns identifying second/third contact per account. Founder makes one introduction call per week.	<i>CSM lead / Founder</i>
Days 1–30	Build the standardised health score model. Three inputs, weighted. Backfill all current accounts.	<i>Head of CS (interim)</i>
Days 1–30	Audit current onboarding flow. Identify the earliest possible first-value moment per customer segment.	<i>CSM + Product</i>
Days 31–60	Roll out new onboarding sequence to all new customers from week 5. Measure time-to-first-value weekly.	<i>CSM lead</i>
Days 31–60	Run first standardised QBRs with top 10 accounts. Five slides, written commitments, executive present on customer side.	<i>CSM lead</i>
Days 31–60	Build renewal motion template. 90-day cadence. Champion validation by month –6, internal narrative by month –4, executive touch by month –2.	<i>Head of CS (interim)</i>
Days 61–90	Roll out renewal motion to all accounts with renewals in the next 9 months.	<i>CSM lead</i>
Days 61–90	Train the CSM team on new playbook. Two half-day workshops plus 1:1 coaching.	<i>Head of CS (interim)</i>
Days 61–90	Set up monthly retention review with Founder. New gross retention target: 90%+ by end of Q4.	<i>Founder / Head of CS</i>

05 · KPIs

What to measure from here

Five KPIs to track weekly or monthly, with target values for end-of-quarter. Anything more is noise; anything less is flying blind.

KPI	CADENCE	TODAY	Q+1 TARGET
Gross retention (rolling 12m)	Monthly	84%	88%
Net revenue retention (rolling 12m)	Monthly	94%	100%
Time to first measurable value	Per cohort	47 days	28 days
Multi-threading depth (accounts with 3+ contacts)	Monthly	38%	70%
QBR completion rate (mid-market+)	Quarterly	41%	85%

WHAT HAPPENS NEXT

On the live engagement, this report is delivered in a 90-minute walkthrough with the founder and the commercial lead. We discuss every risk, prioritise the action plan against the team's actual bandwidth, and agree which items become the first 30 days. About half of audits convert into a Playbook Sprint or a Fractional Head of CS retainer to execute the recommendations. The other half take the report and run it themselves. That's also a good outcome.

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