Welcome Page:

A. Executive Overview

The Executive Over view provides high-level snapshot of the performance, it includes KPIs like Active Users, Total Revenue, and customer satisfaction. What this will help us to make a quick assess on the overall health without diving into more detail.

B. Service Health Map

Then we will move to Service Health Map which analyses the performance across regions. This will give us a revenue structure if the service with respect to the region.

C. Account Risk Dashboard

This page identifies the at-risk accounts and tagging them accordingly so when we jump into recommendation we can identify and take necessary steps without any further delay and escalations.

D. Operations Tracker

This monitors the real time metrics like support ticket for a particular service, renewal impact, and client details. Here we will deep dive into service and its contract status.

E. Churn Prevention

This page uses analytics to prevent the customer loss for the company by identifying the gaps and potential customers to churn. It highlights all the customers in that list based on service type, account manager and region.

F. Action Planner

This is the recommendation tab through which decisions can be made easily for any client the company is working with. It gives us the highlight of risks, the owner, and recommended actions.

Overview

Moving onto the overview page, this is a snapshot of critical business metrics like active users, revenue, and average customer satisfaction. Also, this has the overall trend graph of the company revenue with a threshold value of 8M. As we are halfway through 2025, so the revenue for this year is still being updated.

A. Filters (Top Section)

Coming to the filter sections above, which will be consistent throughout the report. Users can filter the data by Year, Region, Service Type and Account Manager.

B. Revenue Trend Graph (Bottom Section)

The total revenue graph shows yearly trends from 2020-2025. Revenue peaked in 2022 but dipped in 2023 possibly due to market conditions. We can also see 2025 only has 5M revenue as this year is only completed on partial basis.

C. Closing (Business Impact)

To summarise this page, this helps the leader to spot the macro trends in the business. And by combining the use of filters and raw numbers this turns into strategic decisions.

Service Type & Heatmap

This page dives deeper into revenue by service type and customer satisfaction heatmap across regions. This helps to identify the profitable service and potential increase in budget for the next year.

A. Filters (Top Section)

Like the previous page user can filter out the page by the filters provided.

B. Revenue by Service Type (Bar Chart)

This bar chart shows the services the company provides and the revenue generated by those. We can see Cybersecurity has got a slight inch above IT support. This chart can be helpful in deciding the investment ratios for the upcoming years or months.

C. Satisfaction Heatmap (Regional/Manager View)

This heatmap is plotted according to the satisfaction scores achieved by the managers. As every manager is handling accounts in different regions the scores are independently tagged with them. We can see that in Europe Carolyn is the top performer and we can also see the scores which has a scope of improvement.

D. Closing (Business Impact)

This page has 2 important layers: revenue display and customer experiences. For any business making their customers happy and staying responsive to their feedback is the success ratio. This page gives us a glimpse of that and can help to improve the strategy if needed. Along with these 2 metrics, we have tooltip which gives a short description of the customers which are handled by the managers for a specific region. The tooltip shows the Service Level Agreement percentage for the respective customers.

Accounts

1. Introduction (Context)

The page of accounts is on the account health and efficiency. This highlights the renewal risks and support tickets. This page is mainly designed to flag risk clients and make sure the support to them is streamlined quickly.

A. Account Health Summary (Top Section)

The page shows a summarised account details distributing 50 account managers on account health. We can see critical has 11, high risk has 13, high ticket has 14, stable has 12.

B. Renewal Risk Analysis (Table)

The renewal risk analysis table highlights the account which are at risk and categorises those for a quick action if needed. This risk tag is based in the renewal probabilities by the customers. The math behind that has been properly documented as there has an assumption made during this calculation, that is the ticket threshold for every manager should be 100.

C. Support Ticket Efficiency (Table)

This table tracks the per active user tickets and per 1M revenue. The key understanding from this table is high ticket value indicates inefficiencies. Example, Olivia has 132 tickets and Hudson has 125 denoting higher than threshold tickets.

D. Closing (Business Impact)

This page pinpoints the exact number of accounts which needs actions. A tooltip helps us to know how many active users are present for the manager. Also, to simply the things in more granular way we can click on the metrics above to get the complete list of accounts with a specific risk category.

Operational Deep Dive

The operational deep dive page zooms into different service types and produces last 6 months track. The tracking is of the support tickets auto-renewal and client health. This will help the company to know the retention customers opportunities.

A. Filters (Top Section)

We have same filters, but this time we have single select filter to make sure the decisions made by the leaders are accurate and does not confuse with other service types. We can compare 2 different service type for a specific region.

B. Support Ticket Trend (Graph)

This trend graph shows the last 6-month volumes for a service type. This reflects straight into the donut chart which shows 53% of clients are willing to renew the contract so far.

C. Client Details (Table)

The client table helps us to identify the opportunities. We can see the SLA and renewal probabilities for the managers and measure the level of risk taken. We can also see some anomaly in this data as when we scroll down, the renewal probability is less or even 0% despite the SLA has been 90% or above. This requires and data audit or a client check-in.

D. Closing (Business Impact)

The page uncovers the ticket trend and target retention being one of the important business objectives.

Churn Risks

This page works proactively based on all the data we have discussed before. The page is mainly designed to flag customers with potential retention issues across all service types. The page is filtered for only those customers who are flagged under risk retention. These accounts are active and marked as 'Review Terms' indicating could lead to churn.

A. Filters (Top Section)

Filters being same throughout the table reacts accordingly with the user needs.

B. Churn Risk Services (Table)

The table lists numerous accounts which are flagged 'Review Terms.' When analysed for a specific year 2025, many start dates are recent which may denote there is an issue in onboarding or early-term issues.

C. Closing (Business Impact)

The page is a warning page for the business which gives a sign to handle the things in an easy way. It helps the process of customer retention through re-negotiation and adjustments.

Recommendations

This is the action-oriented page which gives insights from other report pages. This assigns clear next steps a business should take in a situation. These are completely based on risk categories, renewal probabilities, etc.

A. Key Columns & Logic

Risk Category – categorises Stable, High Risk, High Tickets and Critical accounts

Renewal Probability – Indicates churn risks

Recommended Actions – Steps assigned to be taken

Action Owner – Based on Risk Category, VP, Account Manager, Support Lead

B. Closing (Business Impact)

This gives a business impact on 3 outcomes: Retention, Efficiency and Growth. Capitalising stable accounts denotes growth, reducing ticket load denotes efficiency and saving accounts denotes retention.