

Building Id4me's Customer Success Engine- My plan

How would I approach customer health scoring and churn prediction?

Customer health scoring framework

Metrics to track:

- Last login date
- Login frequency (daily, weekly)
- Number of features used
- Support ticket trends
- Payment method and frequency on file: annual(more commitment) vs monthly vs quarterly
- Team members invited

How I'd build it:

- SQL/Python processing, combining these signals
- Weighted scoring model (learned from my triage system at Verifier)
- Power BI dashboard with actionable alerts

This is based on what I understood from the products Find, Wash and Append. After looking at the data we have, there might be many more indicators to use.

Churn risk indicators

Metrics to track:

- 14+ days inactive
- Renewal date approaching, plus low engagement
- Sentiment from feedback,reviews(googl , trustpilot,reviews.io), support tickets
- Declining usage trends
- Payment failures
- Low NPS scores

What I would do

- Weekly "at-risk" report to CS team - so that we can speak with the customers directly and help them
- Auto-triggered proactive outreach workflows

If I start next month, this would be my 90-day ROAD-MAP.

Days 1-30: FOUNDATION

- Audit current data infrastructure
- Talk with CS, Product and Data team on pain points
- Map existing workflows
- Identify quick wins :by automating simple processes

Days 31-60: BUILD

- Launch health score MVP or improve the existing one with more indicators
- Automate one manual CS process
- Create initial churn dashboard

Days 61-90: SCALE

- Refine scoring based on CS and Product team feedback
- Automate onboarding, integrate AI into our use cases
- Present findings to leadership

In my experience building operational systems that scaled to 40K+ monthly transactions, the key is to start simple, get feedback, and iterate based on real-time needs.