Customer health scoring system and CS Operations workflow

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Problems and constraints

CURRENT STATE:

- 850 active customers (real estate agencies)
- 2-person CS team (250+ touchpoints/week capacity)
- Reactive mode: Only Day 1 and Day 30 calls
- No systematic way to identify:
  - Churn risk
  - Expansion opportunities
  - Onboarding issues

DATA REALITY:

- HubSpot (CRM): Customer records, support tickets ,renewal dates
- Matomo (Product): Login/usage data (with gaps) ,search volumes
- Stripe (Billing): Payment status
- No data warehouse (building one) - Manual data joins required

THE NEED:

- Build a CS Operations system that works TODAY

My approach –Signal based segmentation

Why not a traditional health score(0-100)?

- Requires clean,complete data(we have gaps)
- Needs historical churn data to validate weights
- Ideal for large CS teams using score bands to route accounts and actions.
- Eg: if a customer has score of 43, what would CS do?

Signal-Based Segmentation Benefits:

- Works with incomplete data (resilient to gaps)
- Clear binary criteria (no arbitrary weights)
- Eg: Customer is Revenue at Risk:Failed payment
- CS knows EXACTLY what to do

The Model:

- 5 customer segments based on behavioral signals
- Each segment = specific CS action

Can evolve to numeric score later once data infrastructure matures and we have historical data to validate.

The 5 segments

1.REVENUE AT RISK (Highest Priority)

Criteria:

- Days to renewal ≤ 60 AND
- (Payment failed OR Support tickets ≥3 OR Inactive 14+ days)

CS Action: Call within 24 hours

Why: Imminent renewal + problem signal = high churn risk

2. **ENGAGEMENT DROP (Early Warning)**

Criteria:

- Inactive 14+ days AND
- Usage level = Low (<8 logins/month)
- Renewal > 60 days (not urgent yet)

CS Action: Re-engagement email

Why: Declining usage before it becomes urgent

The 5 segments- continued

3. EXPANSION OPPORTUNITY (Growth)

Criteria:

- Usage level = High (15+ logins/month) AND
- Features used ≥ 3 AND
- Renewal > 60 days AND
- Support tickets ≤ 1 AND
- On Basic/Standard plan (not Enterprise)

CS Action: Upsell conversation

Why: High engagement = ready for upgrade

4. ONBOARDING STUCK (First 30 Days)

Criteria:

- Account age ≤ 30 days AND
- (Inactive 7+ days OR <2 features used)

CS Action: Proactive training call

Why: Early intervention prevents future churn

5.HEALTHY & STABLE (No Action)

Criteria:

- Usage level = Medium/High (≥ 8 logins/month) AND
- Payment current AND
- Renewal > 60 days

CS Action: Quarterly check-in only

Why: Focus CS time on customers who need it

Data Sources & Implementation

1. HubSpot (CRM)
    - Contract end date
    - Support ticket count
    - Customer account info
    - Subscription plan/tier

2. Stripe (Billing)
    - Payment status

3. Matomo (Product Analytics)
    - Last login date
    - Login count (30d)
    - Features used (30d)

How data flows:

- Matomo →Weekly CSV export → Import to HubSpot
- Stripe - Synced to HubSpot via native integration
- HubSpot calculates derived fields:
    - Days Since Last Login : Current date- last login date
    - Days to Renewal :Contract End Date - Current Date
    - Usage Level (High/Medium/Low)
        - Low: < 8 logins/month
        - Medium :8- 14 logins/month
        - High: 15+ logins/month
- Segment assignment: HubSpot workflow runs daily at 9am, evaluates all customers against criteria, auto-creates tasks

CS Workflow

AUTOMATED TRIGGERS (Daily at 9am)

- Segments recalculated
- Tasks auto-created for flagged customers

9:00 AM - OPEN HUBSPOT
Task Queue Auto-Generated:
eg:

- 3 Revenue at Risk (CALL TODAY)
- 5 Engagement Drop (EMAIL)
- 2 Expansion (UPSELL CONVO)
- 1 Onboarding Stuck (TRAINING)

CS Team sees this prioritized task list

CLICK TASK ->SEE CONTEXT
eg:

- Derras Real Estate
- Renewal :March 15 (34 days)
- Reason: Failed payment
- Last login :5 days ago
- Features used :3

CS Team acts on this

LOG OUTCOME (30 seconds - 1 minute)

- What happened?
    - Reached/ voicemail/email
- What was the issue?
    - Payment/ Usage/Technical
- What did you do?
    - Resolved/follow-up/Customer cancels

1. System auto-updates the segment
2. Creates follow-up if needed
3. Remove from alert list if resolved

Trigger 1 :
HubSpot evaluates all 850 customers:

If customer → "Revenue at Risk"
→ Create task: "URGENT: Call [Company]"

If customer → "Engagement Drop"
→ Create task: "Email [Company] re-engagement"

Similarly for onboarding,expansion

Trigger 2 (After CS logs):
IF "Issue Resolved"
->Update segment to "Healthy & Stable"
->Remove from alert list

IF "Follow-up needed"
-> Create task for [selected date]
->Monitoring continues (prevents missed escalations) **
->CS checks for existing tasks before acting

IF "Customer will cancel"
->Update status to "Canceled"
->Stop all CS tasks

**Design choice explained:why continue monitoring after follow up scheduled
Catches escalations (payment fails, tickets spike) before follow-up date

Small customer base (850) = manageable

Risk of missing churn > risk of duplicate tasks , can refine based on CS feedback in first 60 days