

Example Queries for Testing Your Customer Insight Gem

CHURN RISK ANALYSIS

Query 1: General Churn Risk

"Which customers are at highest risk of churning in the next 90 days?"

Expected Output:

- List of top 10-15 at-risk customers
 - Risk score with justification
 - Specific indicators (EHR issues, negative sentiment, champion departure)
 - Recommended intervention for each
 - Timeline for action
-

Query 2: Segment-Specific Churn

"Show me Enterprise customers with health scores below 60. What are the common patterns?"

Expected Output:

- Filtered list of Enterprise customers
 - Common pain points across the segment
 - Whether issues are product, support, or relationship-based
 - Comparative analysis vs. healthy Enterprise customers
 - Targeted action plan
-

Query 3: Root Cause Analysis

"Why are mid-market practices with Epic integrations showing declining health scores?"

Expected Output:

- Identification of Epic integration failure patterns

- Timeline of when health declined (correlation with Epic updates?)
 - Specific ticket examples
 - Impact on practice operations
 - Technical and relationship-based solutions
-

EXPANSION OPPORTUNITIES

Query 4: Upsell Candidates

"Which customers are good candidates for telehealth module upsell?"

Expected Output:

- Customers showing telehealth-related behavior/requests
 - Health score threshold (>70)
 - Feature requests or workarounds indicating need
 - Estimated additional revenue per customer
 - Personalized talking points for each
-

Query 5: Multi-Location Expansion

"Show me single-location practices that might expand to multiple locations"

Expected Output:

- Practices with growth indicators
 - Those mentioning expansion in calls
 - Usage patterns suggesting scale
 - Optimal products to offer
 - Timing recommendations
-

PRODUCT INSIGHTS

Query 6: Feature Gap Analysis

"What are the top 5 most requested features and which customer segments want them?"

Expected Output:

- Ranked feature requests by vote count
 - Segment breakdown for each feature
 - Business impact stated by customers
 - Competitive context (do competitors have this?)
 - Prioritization recommendation
-

Query 7: Usage Pattern Analysis

"Which features have high adoption in successful customers but low adoption in at-risk customers?"

Expected Output:

- Feature adoption comparison
 - Specific features correlated with success
 - Barriers to adoption for at-risk customers
 - Training or UX improvements needed
-

Query 8: Integration Issues

"Analyze all EHR integration failures in the last 60 days. What's the pattern?"

Expected Output:

- Total incidents by EHR vendor
- Affected customer segments
- Common error types
- Patient care impact

- Engineering backlog priorities
 - Preventive measures
-

CUSTOMER SUCCESS INSIGHTS

Query 9: Champion Risk

"Which high-value customers don't have an identified champion?"

Expected Output:

- Customers >\$10K MRR without champion
 - Last relationship touchpoint
 - Account tenure (newer = higher risk)
 - Suggested outreach approach
 - Champion identification strategy
-

Query 10: Onboarding Analysis

"Compare customers who reached full adoption within 90 days vs. those who didn't. What made the difference?"

Expected Output:

- Success factors (EHR integration timing, training, champion engagement)
 - Red flags in slow-adopting customers
 - Optimal onboarding sequence
 - Resource allocation recommendations
-

COMPETITIVE INTELLIGENCE

Query 11: Competitive Threats

"Show me any mentions of competitors in customer interactions. What are they saying?"

Expected Output:

- Customers evaluating alternatives
 - Specific competitors mentioned
 - Reasons for considering switch
 - Features/pricing they're comparing
 - Retention strategy per customer
-

Query 12: Win/Loss Patterns

"What patterns exist in customers who expanded vs. those who didn't when presented with upsell?"

Expected Output:

- Success characteristics
 - Objections from those who declined
 - Pricing sensitivity
 - Feature gaps
 - Improved expansion playbook
-

SEGMENT-SPECIFIC INSIGHTS

Query 13: Specialty Analysis

"How do Cardiology practices differ from Primary Care in their product usage and needs?"

Expected Output:

- Feature adoption by specialty
 - Support topics by specialty
 - Satisfaction scores comparison
 - Specialty-specific pain points
 - Product roadmap implications
-

Query 14: Org Type Patterns

"Compare Hospital Systems vs. Private Practices: engagement, churn risk, and expansion potential"

Expected Output:

- Behavioral differences
 - Support needs differences
 - Contract preferences
 - Growth trajectories
 - Tailored CS strategies for each
-

OPERATIONAL INSIGHTS

Query 15: Support Quality

"Which support topics have the longest resolution times and lowest satisfaction scores?"

Expected Output:

- Problem areas in support
 - Knowledge gaps
 - Documentation needs
 - Training requirements
 - Process improvements
-

Query 16: Customer Health Trends

"Show me customers whose health scores declined >20 points in the last quarter. What happened?"

Expected Output:

- List of declining customers
- Timeline of decline
- Triggering events (product issues, org changes, etc.)

- Whether we reached out
 - Recovery actions
-

REVENUE OPTIMIZATION

Query 17: Pricing Analysis

"Which customers are under-priced based on their usage and value derived?"

Expected Output:

- Customers using beyond their tier
 - Value metrics (patients served, providers using)
 - Renewal timeline
 - Pricing adjustment recommendation
 - Justification talking points
-

Query 18: Payment Risk

"Customers with past-due payments: what are the underlying issues?"

Expected Output:

- Whether payment issues correlate with satisfaction
 - Practice financial health indicators
 - Billing vs. value perception issues
 - Collection strategy
 - Churn risk assessment
-

STRATEGIC INSIGHTS

Query 19: Market Trends

"What common pain points are emerging across all customers in the last 30 days?"

Expected Output:

- Trending topics
 - New vs. recurring issues
 - External factors (regulatory changes, EHR updates)
 - Market opportunity identification
 - Product strategy implications
-

Query 20: Success Stories

"Which customers have improved their health scores by >30 points? What interventions worked?"

Expected Output:

- Turnaround success stories
 - Interventions that worked
 - Timeline to improvement
 - Replicable playbook
 - Case study candidates
-

PREDICTIVE QUERIES

Query 21: Leading Indicators

"What behaviors in the first 30 days predict long-term customer success?"

Expected Output:

- Early adoption milestones
 - Onboarding completion markers
 - Champion engagement signals
 - Usage thresholds
 - Revised onboarding playbook
-

Query 22: Renewal Forecast

"Predict renewal outcomes for customers with contracts expiring in Q4"

Expected Output:

- Renewal likelihood by customer
 - Risk factors for each
 - Intervention timeline
 - Success probability with/without action
 - Resource allocation plan
-

HOW TO TEST THESE

Phase 1: Basic Functionality (Week 1)

- Test Queries 1, 4, 8, 15
- Validate RAG retrieval accuracy
- Check citation quality
- Verify actionability of outputs

Phase 2: Complex Analysis (Week 2)

- Test Queries 3, 7, 10, 16
- Assess root cause identification
- Evaluate pattern recognition
- Check comparative analysis quality

Phase 3: Strategic Insights (Week 3)

- Test Queries 11, 14, 19, 21
- Validate business impact quantification
- Check recommendation quality
- Assess predictive capability

Phase 4: Industry Specificity (Week 4)

- Test all queries with healthcare context

- Verify healthcare terminology usage
 - Check workflow understanding
 - Validate compliance awareness
-

SAMPLE EXPECTED OUTPUT

For Query: "Which customers are at highest risk of churning in the next 90 days?"

 HIGH CHURN RISK: 12 Customers (\$287K MRR at Risk)

TOP 3 IMMEDIATE ACTIONS NEEDED:

- 1. Regional Medical Group (HC-1047) - \$45K MRR
Risk Score: 92/100 (Critical)

Indicators: